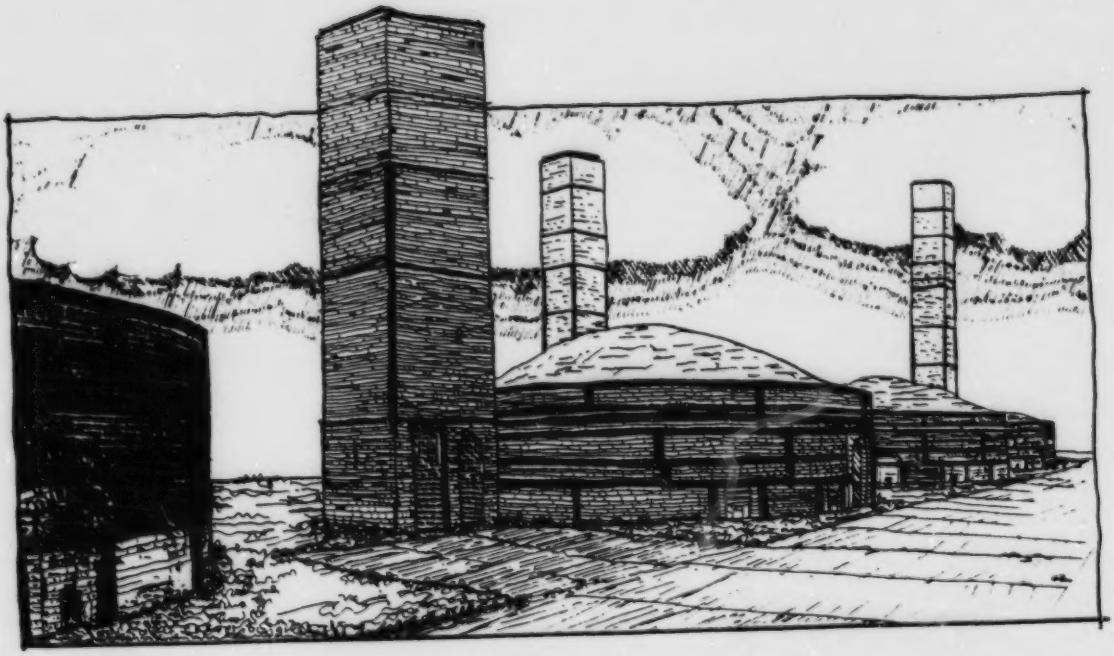
Feasibility Assessment

and

Business Plan



Claybank Brick Plant

June 1997

FEASIBILITY ASSESSMENT

and

BUSINESS PLAN

CLAYBANK BRICK PLANT

NATIONAL HISTORIC SITE

Final Report

Submitted to:

Saskatchewan Heritage Foundation

Submitted by:

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June 1997

102-07473/

Claybank Brick Plant National Historic Site
Feasibility Assessment and Business Plan
Executive Summary

Background:

The Claybank Brick Plant was acquired by the Saskatchewan Heritage Foundation in 1992, and designated as a National Heritage Site in 1994 by the Historic Sites and Monuments Board of Canada as "... an extraordinarily intact example of an early 20th century brick making complex... with much of the original brickmaking equipment".

In August, 1996, Crosby Hanna & Associates, in association with Ian MacPherson, Management Consultant and Edwards & Edwards, Architects, were retained by the Saskatchewan Heritage Foundation to undertake a study to determine the feasibility of restoring and operating the former Claybank Brick Plant as a tourist attraction.

Terms of Reference:

The consultant was asked to examine and report on the feasibility of three potential levels of development:

Level 1	Stabilized ruins, with self-guided tours
Level 2	Rehabilitated buildings, with guided tours and working demonstrations
Level 3	Rehabilitated buildings, guided tours, numerous working exhibitions (but no brick firing) and a visitor reception centre.

In addition, with feasibility suggested, the study (in the second phase) involved preparation of a business plan aiming at ultimate development and operation of the attraction.

Key Study Results:

- The Claybank Brick Plant can be developed and operated as a unique single-purpose heritage facility in North America whose programming and theme, and quality / condition of site and facilities, would make it virtually the only location able to interpret the history of the brick manufacturing industry.

- None of the three options as defined in the Terms of Reference would be appropriate. However, the consultant recommended consideration of a fourth option, which is a hybrid of the Level 1 and Level 2 options.

- The possible future designation of the Claybank Brick Plant as a World Heritage Site by UNESCO could have a very positive impact on the Plant's profile as a western Canadian tourist attraction, as well as on the potential availability of capital and operating funds to ensure its appropriate level of development and on-going operation.

Recommendations:

1. "If such non-monetary factors as educational benefits and the social benefits of protecting and preserving a significant piece of Saskatchewan's industrial heritage, and financial factors such as the likely modest local and area secondary spin-off benefits and modest long-term employment creations opportunities, are to be considered in deciding the future of the Claybank Brick Plant project, the Foundation should consider that the operation of a tourist attraction at the site could be operated with modest levels of on-going subsidization. It should be noted that the operation of subsidized attractions or components of attractions (even in the private sector) is common throughout North America, because of the other benefits realized by such operation." Should designation be obtained for the project a s a World Heritage Site, financial projections suggest that long term subsidies would not be required.

2. "If a decision is taken to pursue possible development of a tourism attraction at the Claybank Brick Plant, such development should be based on the Level 1.5 scenario set out in Section 5.6 of this report. Further, all items identified for capital development should be carefully considered to determine whether there may be ways to reduce or eliminate the costs associated with some items."

Financial Considerations:

The Hybrid Level 1.5 Option development cost projections include:

▸ Investigation, Assessment and Planning	$ 132,800
▸ Predevelopment Site Work	$ 398,400
▸ Building Stabilization/Restoration	$ 637,000
▸ Site and Infrastructure Development	$ 77,000
▸ Interpretive Development	$ 84,500
TOTAL DEVELOPMENT COSTS	$1,329,700

Potential revenue sources include the following:

- *New Careers Corporation*

  Current one year commitment for $250,000 worth of labour
  (Heritage Branch Comment: extension of agreement is highly probable; a 5 year commitment could be worth $1,250,000.)

- *Canadian Heritage (Parks Canada)*

  National Cost Share Agreement may realize $250,000 to $3000,00 over 5 years
  (Heritage Branch Comment: recent meetings with Canadian Heritage staff suggest that a significantly higher amount, in the range of $5000,000, may be realized.)

- *Private Sector*

  Not yet explored

- *Summer Student Employment Subsidies*

  Likely available in the range of $20,000 annually

- *Tourism*

  Not yet explored

Projections of operating revenues and expenses include the following considerations:

Three projections have been made, for the 1st, 3rd and 5th year of operation, based upon attendance figures of 90% of those estimated for Level 2:

	Year 1	Year 3	Year 5
Revenues	$113,400	$128,000	$139,000
Expenditures	$181,000	$183,000	$183,000
Projected Deficit	$ 67,600	$ 55,000	$ 44,000

If Level 2 attendance figures are realized, the projected deficits are reduced as follows:

$ 55,000	$ 41,000	$ 29,000

NOTE: With up to $20,000 in annual provincial or federal student employment subsidies, it is projected that **the project could come relatively close to a break even situation from Year 5 onward.**

Based on information received from a small number of other designated World Heritage Sites in North America, the consultants are confident that the Claybank Brick Plant would easily achieve annual attendance levels and operating revenues **at least 25 to 50% greater than base estimates** should the Plant receive World Heritage Site designation. In addition, such World designation would have significant positive economic spinoffs for the tourism sectors in Regina and Moose Jaw and the northern portion of the Great Trails Getaway Region.

Business Plan:

Strong marketing links can be developed with a small number of key existing tourism attractions in the area around Claybank, including the Temple Gardens Mineral Spa in Moose Jaw and the Saskatchewan Science Centre and Royal Saskatchewan Museum in Regina. Information and exchange displays with several other attractions in the area and elsewhere in the province will also build upon potential links.

The recommended operating plan for the Claybank project is based upon the establishment of a self-standing, not-for-profit corporation, whose Board would include representatives from the area around Claybank, the business sector, the Saskatchewan Heritage Foundation, and other groups with an interest in industrial heritage preservation and interpretation.

The recommended five-year marketing plan for the Claybank project is based upon successful programs developed by and for other comparable attractions and the particular key markets and marketing links which the Claybank project can draw upon.

The recommended financing plan to bring the project to full recommended development includes use of available provincial employment training programs, funding assistance from Canadian Heritage to national historic sites, corporate and foundation fund raising, direct contributions by the Saskatchewan Heritage Foundation, and special local/area and other fund-raising campaigns.

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Cover illustration: Anna Ringstrom
Crosby Hanna & Associates

1. INTRODUCTION

1.1 BACKGROUND AND PURPOSE

The Saskatchewan Heritage Foundation acquired the Claybank Brick Plant property in 1992, as a donation from the then owner, A.P. Green Refractories Ltd. Since acquiring the property, the Foundation has expended limited funds for site cleanup, security, maintenance, roofing repair, general liability insurance requirements, utility costs and additional research. Access to the labour resources of the New Careers Corporation has provided an opportunity to see funds expended on cleanup, repair and stabilization work generate benefits significantly greater than would be achievable with commercial contractors.

In August 1996, Crosby Hanna & Associates, in association with Ian MacPherson, Management Consultant and Edwards & Edwards, Architects, were retained by the Foundation to undertake a study to determine the feasibility of restoring and operating the former brick plant as a tourist attraction. As feasibility was suggested, the study (in the second phase) involved preparation of a business plan aimed at ultimate development and operation of the attraction.

1.2 LOCATION AND EXTENT

The Claybank Brick Plant is located in south-central Saskatchewan, at the base of the Dirt Hills approximately 10 km northwest of the Village of Avonlea. The site is thus approximately :

- 40 km south of the Trans Canada Highway (#1);
- 55 km north of the Red Coat Trail (Highway #13);
- 45 km west of the Can Am International Highway (Highways 39 and 6);
- 45 km south-southeast of the City of Moose Jaw; and
- 65 km southwest of the City of Regina.

The Foundation-owned property extends over approximately 27 ha in the northeast quarter, Section 28, Township 12, Range 24, west of the Second Meridian. This property does not include the clay pits which initially provided the raw materials for the operation. These pits lie approximately 400 m south of the plant, also in the NE-28-12-24-2.

Within the 27-ha parcel are located the following buildings and structures:

- main plant building (including clay storage shed, clay bins, factory, hand mould area, hot floor drying areas, tunnel dryers, transfer track and engine room);
- ten downdraft kilns and five associated stacks;
- two stock sheds (including brick grinder house) and rail transfer point;
- water pump / filter house;
- bunk house;
- garage;
- boiler room / ball mill room;
- office;
- laboratory;
- carpenter shop;
- one remaining married worker's house; and
- one of three remaining manager's houses.

The two other manager's houses are located on separate parcels of approximately 0.5 ha each. The northern of these two houses is owned by the Claybank Brick Plant Historical Society and the southern remains in private hands (Mr. Ken Oakley, a former plant employee and the individual now responsible for plant maintenance and security).

1.3 HISTORICAL OVERVIEW

This overview is drawn directly from a brochure on the Claybank Brick Plant, prepared by the Saskatchewan Heritage Foundation, in 1995 and which credits a 1992 research report entitled *The Development and Operation of the Claybank Brick Plant: 1886 - 1989*, prepared by Saunders, Richan and Associates.

1.3.1 The Early Years (1886 - 1904)

The first record of clay deposits in the Dirt Hills of Saskatchewan was made in 1886 by Tom McWilliams, a local homesteader, when he applied to the federal government for permission to mine the clay. At this location he found a rare and rich deposit of "refractory" or heat resistant clay. Refractory clay is therefore particularly well suited for manufacturing fire bricks, which in turn are used in fireplaces and to insulate boilers, furnaces and any area where intense heat is generated.

McWilliams extracted clay on a sporadic basis over the next several decades and apparently sold his product to brick manufacturers in Moose Jaw. He entered into a formal agreement with the Moose Jaw Fire Brick and Pottery Company shortly after that firm was established in 1904.

1.3.2 Moose Jaw Fire Brick and Pottery Company (1904 - 1912)

Five prominent Moose Jaw citizens comprised the shareholders and Board of Directors of this company: J.H. Kearn (a real estate agent); Edward Matthews (financial agent, Alderman and Mayor); Arthur Hitchcock (developer, land speculator and local banker); Charles Turnbull (local doctor); and J. McCulloch (also a local doctor).

The new company acquired McWilliams' homestead property plus other nearby clay deposits. Serious development of the property was not feasible, however, as the clay had to be hauled by horse and wagon some 50 km from the Dirt Hills to Moose Jaw.

Construction of a Canadian Northern Railway line through the region in 1910 had a significant impact on the clay deposits and the development potential of the site. Plans were then put into place to construct a brick plant next to the major clay deposits, thereby eliminating the need to haul the raw material to Moose Jaw. A spur line from the newly established town of Claybank to the plant site gave company shareholders direct rail access to markets for their products. In order to proceed with development plans, however, the company first re-organized under a new name - Saskatchewan Clay Products - in 1912, and Tom McWilliams' shares were bought out by the other shareholders.

1.3.3 Saskatchewan Clay Products (1912 - 1916)

Construction of the brick plant was initiated in 1912 and completed by 1914. The early years of operation were plagued by the economic recession of 1913, in combination with the start of World War I the following year, and the plant was therefore closed until 1916, when the operation was reactivated. Shortly thereafter, the company re-organized again, this time under the name "Dominion Fire Brick and Pottery Company".

1.3.4 Dominion Fire Brick and Pottery Company (1916 - 1954)

When brick production recommenced in 1916, the new management also added a new type of brick to the product line: face brick. This kind of brick was used for building construction and the face brick subsequently produced at the Claybank plant was featured on some of Saskatchewan's most prominent public buildings. Many schools, churches, court houses, government and commercial buildings, theatres and private residences were faced with the attractive T-P Moka or Ruff-Tex brick manufactured at this plant. The quality of this brick became so well known that even the central tower of Quebec City's Chateau Frontenac was faced with Claybank brick.

In many ways, these were the "golden years" for the brick plant. The railways and industrial sites placed a high demand on its stock of top quality fire brick. As well, the new lines of face brick, though a secondary product to the company, rapidly caught the public's eye and became a popular building construction material. Having built up an extensive clientele and varied product lines during the 1920's, the company was able to survive the subsequent Great Depression of the 1930's.

By the 1950's, the Claybank brick plant was reported to be the largest clay products plant in Saskatchewan, surpassing the other two major facilities at Bruno and Estevan.

1.3.5 Dominion Fire Brick and Clay Products (1954) Ltd. (1954 - 1971)

In 1954 the Claybank facility was sold to Redcliff Pressed Brick, an Alberta Company, and management of the firm transferred from its Saskatchewan-based founders. The next year, A.P. Green Fire Brick Company, of Mexico, Missouri, bought a controlling interest in Redcliff's Saskatchewan operations. Meanwhile, post-war changes in industrial use for refractory brick had reduced the company's share of, or completely eliminated, some markets - particularly locomotive refractory brick, which became obsolete with the railways' conversion to diesel engines.

During this era, six of the ten coal-fired down-draft kilns were converted to natural gas heat. This improved the efficiency of the fire brick operation but the ultimate closure of the coal-fired kilns made it impossible for the company to manufacture the same high quality T-P Moka face brick, which depended on impurities in the coal for its colour. Since A.P. Green was not particularly interested in manufacturing face brick, this product line was discontinued in the 1960's.

1.3.6 A.P. Green Refractories Ltd. (1971 - 1989)

In 1971, North America's largest producer of refractory brick formally purchased the Claybank operation as part of its corporate restructuring. Now known as A.P. Green Refractories Ltd., the company managed brick plants around the world and continued to produce fire brick from its Claybank facility until 1989, when corporate downsizing resulted in closure of the entire Claybank operation. The facility was then offered to the Saskatchewan government, which accepted the donation in 1992, through the Saskatchewan Heritage Foundation.

1.3.7 Conclusion

The Claybank Brick Plant was a successful Saskatchewan-based small industry, specializing in the production of refractory brick. The company's initial success appears to have been due to a combination of skilled management, continuity of key personnel and development of high quality refractory brick products, interspersed with other quality products such as face brick. Ultimately, re-organization of the brick market, and changes in technology, forced the plant to close after almost 75 years of continuous operation. Although some modernization of the plant has occurred over time, most of the brick plant still demonstrates the effective use of efficient 19th century brick manufacturing technology throughout most of the 20th century.

The Government of Canada's recent invitation to the Saskatchewan Heritage Foundation to apply to have the Plant nominated by Canada for possible designation as a World Heritage Site by UNESCO is an indication of the Plant's historical significance and state of physical preservation.

1.4 THIS REPORT

This report presents the results of both phases of the consulting team's study (i.e. both the assessment of the financial feasibility of developing a tourism attraction at the Claybank Brick Plant and preparation of a comprehensive business plan to help guide the project through development to operation). As such, it contains documentation related to the following:

- a review of comparable attractions (Section 2);
- an overview of tourism activity and facilities in the area around Claybank (Section 3);
- an elaborated conceptual definition of the three optional levels of development contemplated (in the project Terms of Reference) for the brick plant site, complete with preliminary estimates of the capital costs associated with each of the three levels (Section 4);
- financial analysis of the three optional levels of development, based on estimated capital and operating costs, potential funding sources, projected attendance and revenues associated with same, and recommendations regarding the preferred level of development (Section 5); and
- a business plan, setting out recommended operational, organizational and management details, a marketing plan for the project, a financial plan and a recommended action plan to take the project through subsequent planning and design stages and project development to opening and operation (Section 6).

2. REVIEW OF COMPARABLE FACILITIES

2.1 OBJECTIVES

The consulting team has sought out three or four North American attractions which could be compared to the Claybank Brick Plant site and facilities in terms of industrial heritage theme and storyline and other relevant factors. In addition, a sample of other heritage and historic sites at various levels and stages of development has been reviewed.

The purpose of this review has been to identify potentially significant factors which could have an impact on the market feasibility and heritage significance of the Claybank project, such as:

- geographic location, especially in relation to important transportation corridors, market populations, complementary and other tourist attractions and any other market-related assets;
- major heritage themes and story elements and the facility development, programming and other services which revolve around them;
- background on development as a heritage attraction, present management structure and future plans;
- attendance / market factors, including key market segments and marketing strategy;
- financial issues, including capital costs and operating revenues and expenditures; and
- key apparent success and failure factors, including lessons learned from past experience.

Also, the consulting team has obtained and reviewed general information on heritage tourism with a view to highlighting key trends, indicators of consumer behaviour affecting the heritage tourism sector and recent performance of heritage facilities in the Prairie region.

2.2 APPROACH AND SOURCES USED

A preliminary list of comparable facilities was developed by the consulting team from the following sources:

- previous studies and assignments carried out by the consultants, including regional and local tourism studies in Saskatchewan, Manitoba and Ontario; many of these assignments involved a general or detailed feasibility analysis of a proposed new (or modified / expanded existing) heritage facility or historic site in terms of its tourism potential;

- the consulting team's general knowledge of heritage tourism gained through previous consulting work and personal travels;

- suggestions as to potentially comparable facilities received from the Steering Committee for this study; and

- a comprehensive search of the World Wide Web / Internet, using several key words and phrases and emphasizing Canadian and other North American sites / facilities (although some information of relevance was found and retained from Europe and Asia).

In addition, a focussed search for heritage sites specifically related to the brick manufacturing industry was carried out, involving:

- a search on the World Wide Web;

- enquiries with Parks Canada, Department of Canadian Heritage, and heritage / historic site operators interviewed in Canada;

- enquiries with the American Brick Institute (Reston, Virginia), a trade association which represents over 150 brick manufacturing establishments in the United States (accounting for more than 90% of the seven billion bricks produced in the United States each year);

- contact with the Research Department of Greenfield Village / Henry Ford Museum, a major industrial heritage interpretive complex in Dearborn, Michigan; and

- enquiries with the National Registry of Historic Places in Washington, D.C.

The results of the search to this point, with respect to heritage sites specifically related to the brick manufacturing industry, can be summarized as follows:

- In Canada, two facilities appear to be most relevant (and were also suggested by the Steering Committee); the Don Valley Brickworks located in Metro Toronto and presently undergoing restoration as part of a major program of restoration and development of the Lower Don Parkland; and the Medalta Potteries Museum in Medicine Hat, Alberta, which already offers the public a centre interpreting the history of the area's pottery industry and which is presently undertaking the restoration of a neighbouring historic pottery manufacturing complex. Both facilities will be discussed in more detail in a later section of this report.

- In the United States, no historic sites or heritage facilities of direct relevance to the history of brick manufacturing have been identified to this point. The National Registry of Historic Places provided the consulting team with a list of 71 historic places whose name or theme included the word "brick"; of those, eight were found to be former brick manufacturing establishments. Secondary contacts with respect to those eight locations, and review of available data in the National Register Information System, yielded the following information:

  1. The Red River Valley Brick Company in Grand Forks, North Dakota: the brick industry flourished in the Grand Forks area during the area's construction boom period from 1880 to 1900; in 1890, four companies merged to form the Red River Valley Brick Company; the company's main building, built in 1909 with the area's characteristic creamy-yellow Grand Forks brick, is now a converted modern office building and no interpretive programming is offered to the public (source: Grand Forks Convention and Visitors Bureau).

  2. Remillard Brick Company, Oakland California (and Remillard Kiln, Marin County); no preservation or interpretive programming is offered with respect to either facility; the Oakland site still includes two abandoned buildings and the kiln is in a state of disrepair (source: Oakland County Historical Society).

  3. Guignard Brick Works, Cayce, South Carolina: the historic brick plant is located across the river from the city of Columbia; only the original kilns remain on the site, surrounded by a large condominium development (source: South Carolina Historical Society).

  4. Dalton Brick Company, Hopkinsville, Kentucky: the plant closed approximately ten years ago and there has been no restoration or interpretive activity at the site; future activity is possible but no definite plans have been made in that regard; one intact building remains on the site (source: Christian County Office).

5. Continental Clay Brick Plant, near Martinsburg, West Virginia: no restoration or programming at the site; no buildings remain on site, although ten structures, in various states of repair, continue to exist (source: Berkeley County Planning Department).

6. United Brick Corporation Brick Complex, Washington, D.C.: the complex is now used as office / laboratory facilities by the Agricultural Research Service, United States Department of Agriculture; no heritage interpretation is offered; the site originally comprised a complex of six buildings and twenty other structures; some of the structures have been removed (source: U.S. National Parks Service).

7. Western Clay Manufacturing Company, Butte, Montana: this plant operated from 1905 to 1960; despite the completion of an historic significance study of the site in 1985, which recommended that efforts be made to preserve the complex, no action has been taken; the Butte site is a complex of 16 buildings and structures; some are intact (source: Butte / Silverbow County Archive).

The National Register Information System does not maintain records of equipment left at any of these sites.

As noted above, the consulting team's research with respect to brick industry-related historic or heritage programming development in Canada included direct enquiries with agencies and officials involved in heritage tourism and searches through sources such as the Canadian Heritage Information Network, a web site maintained by the Department of Canadian Heritage. It is noted that persons contacted expressed a special interest in the physical condition of the Claybank Brick Plant site (in particular, its status as a conserved area under the care of the Saskatchewan Heritage Foundation) and the buildings and other facilities on the site (as compared to the serious deterioration or virtual loss of those at other former brick plants).

For example, a former brick plant at Beausejour, Manitoba (located approximately 50 km northeast of Winnipeg) has received provincial designation as an historic site but, because of its physical state, only some foundations and rubble are now left on the site), no efforts to restore the site or interpret its history can be reasonably foreseen. Only a few plaques are in place to orient the small number of visitors to the site, estimated at perhaps 1,000 visitors per year. A local committee conducts tours in the summer if it receives summer student employment funding.

The former Leary Brick Works at Roseisle, Manitoba (located approximately 80 km southwest of Winnipeg) was built in 1900 and ceased operation in 1951. Its physical condition, location and history make this facility comparable to the Claybank plant. The present owners of the property on which the brick plant stands have expressed no interest

in obtaining provincial historic site designation, nor in developing the historic plant as an interpretive site for visitors. The original factory building with chimney stack, and kiln, still stand on the site (source: Historic Resources Branch, Province of Manitoba).

Findings thus indicate that the Claybank Brick Plant, even at a modest level of stabilization / restoration and interpretive program development, could be developed and operated as a unique single-purpose heritage facility in North America whose programming and theme, and quality / condition of site and facilities, would make it virtually the only location able to interpret the history of the brick manufacturing industry.

2.3 REVIEW OF COMPARABLE ATTRACTIONS

Four facilities with exclusive or significant industrial heritage components were reviewed in detail. One, the Don Valley Brickworks, was reviewed because the heritage interpretation component of its overall project, the Lower Don Parkland restoration and development, comes closest by far of any project in North America to the theme and storyline that would be interpreted at Claybank. It is noted, however, that to this time, the brickworks restoration is part of a multi-use recreation / park master plan and even its historic facilities are to be used for purposes other than only historic interpretation. The critical need for green space in a large metropolitan area dominates planning and spending decisions in this case.

Three other facilities, located in British Columbia, Alberta and Manitoba, were reviewed because:

- they are located on or near a major traffic / tourism corridor and near either a major urban centre or significant tourism destination area;

- they represent a range of levels of existing or planned development, in terms of scale (capital costs already incurred or committed and ongoing programming) and diversity of use (single-purpose heritage interpretation versus mixed-use interpretation, recreation and commercial); and

- they represent an increasingly common denominator in heritage tourism facility development and management: the need to achieve break-even financial operation, or at least to minimize ongoing operational subsidies; in addition, reductions in departmental budgets, external subsidies and other funding sources' level of support, mean that revenue diversification has become a very important consideration for such facilities.

2.3.1 Don Valley Brickworks, Metropolitan Toronto, Ontario

The historic brick plant is located on the banks of the Lower Don River, which passes through some of Metro Toronto's most developed and densely populated areas. The Lower Don played an important role in the history of the region from the point of view of settlement, agriculture and industry and trade. Today, the focus on re-naturalization of the watershed and revival of the Lower Don Valley as a natural greenspace corridor means that the historic brickworks will be restored and its history interpreted as part of a much larger master plan.

The industrial history of the Don Valley corresponded with clearing of the valley to create land for development, the importance of the river as a transportation route, development of rail and road systems in the valley and the abundance of such natural resources as water and clay. Manufacturers of paper, chemicals, beer and brick established there.

The Don Valley Brickworks were founded by the Taylor family in 1890; the plant used shale extracted from the nearby valley walls and water from the river to produce much of Toronto's building brick for the next fifty years. Indeed, the north face of the old brickworks quarry has international significance for its geology, revealing glacial deposits and fossils at least 300,000 years old, according to the Parks and Culture Department of Metropolitan Toronto. The plant ceased operation in 1984 and was acquired for public open space / recreation purposes. In 1992, the Don Watershed Task Force was established and it has begun to develop a regeneration plan for the entire watershed, under the guidance of a council composed of public and elected members.

The Don Valley Brickworks are located on a forty-acre (16 ha) site and total funding of approximately $5 million has already been committed to site restoration; total spending of $6 million is probable. Important factors in determining the required capital expenditures are the state of disrepair of the plant's facilities and the fact that the site is located on a floodplain which can be inundated with three to four feet (0.9 to 1.2 m) of water during a regional flood event.

Restoration of one or two buildings in the brickworks is included in present plans, including a display area with interpretive story boards, washrooms and offices. The approximately thirty-acre (12 ha) quarry area, which at one time reached a maximum depth of 200 feet (60 m), was filled in over time with excavation materials from the region, is now virtually level. Piles of bricks and significant ponding on the site characterize the abandoned nature of the plant site.

The immediate brickworks site includes a 17-building complex (the oldest built in 1889), four original chimneys (only one remains standing), a rail spur, remains of kilns (some have been removed), a long tunnel kiln (up to 90 m long), some equipment used by the company, brick forms and a mural on the wall of one building (which includes a

representation of the plant's history). It is hoped to return other production equipment to the site as it is located.

Of the original $5 million capital budget, approximately $3 million has been spent on buildings, quarry and landscaping, with an emphasis on building stabilization. Structural repairs, masonry work and roof replacement have accounted for the bulk of the spending on the buildings to date. One chimney was found to be leaning almost 43 inches (1.1 m) off plumb and twisting slightly, has been restored. Some other buildings will be restored in the future. Because of the threat of vandalism, window replacement has been, and will be, minimized.

It is estimated that approximately $1.2 million would be required to stabilize and/or restore all remaining facilities and these funds are not available at this time. One project under consideration is the conversion of some storage sheds for public access and use.

Because the emphasis on site restoration in the Lower Don Parkland is on the development of a publicly accessible green space in a large urban area, landscaping of the brickworks site is receiving much attention. The relationship of the buildings to the quarry is a major factor in site planning. It is hoped that a major private donation will soon be announced for landscaping of the quarry area, with an emphasis on the re-creation of a seven-hectare pond / creek system, including wetland planting and pike spawning habitat creation. Future spending on a fossil garden is planned in a later project phase.

The site is owned and managed by the Metropolitan Toronto Region Conservation Authority (MTRCA). In most cases, the MTRCA leases its properties to Metro Parks and Culture to manage. This project, however, remains under MTRCA control, in part because the Authority was able to receive $2.5 million from a provincial government job creation program. Metro Toronto matched that amount. In addition, the Authority is a registered charitable foundation and has already raised nearly all of its targeted amount of $500,000 for the project. Other funding received includes $120,000 from the Federal/Provincial Great Lakes Cleanup program and a private donation of more than $500,000 is expected soon for the quarry garden. Once development is complete, it is expected that the site will be leased to Metro Parks and Culture.

A previous consultant study, conducted during the period of much more abundant public dollars, recommended a capital budget of $20 million and projected significant tourism impacts. The present project emphasizes public access and recreation in a park setting. No detailed projections of site-related revenues and expenditures, on an ongoing basis, have been made. it is expected that some revenues will be raised through special programs on the site and possible rental of buildings / offices in the future.

2.3.2 Stonewall Quarry Park, Stonewall, Manitoba

Stonewall is a growing town with a population of 3,200 located approximately forty kilometres north of Winnipeg. The limestone quarrying and quicklime industry was a major factor in the original development of the town and area, from 1882 to 1969. The historic quarries are now part of the Town's Park, which sits on a 30-ha site.

Ordovician dolomite (from geological deposits dating back up to 500 million years ago), building stone and quicklime were in strong demand during Winnipeg's building boom in the late nineteenth century. Limestone from the site was burned in kilns (some of them still standing in the Park) to make quicklime used in plaster and as a disinfectant. Crushed rock from the quarry was used as ballast under railway tracks. Building stone was also produced, especially for local / area use.

The Park today is a multi-use recreation complex and includes:

- a Visitor Reception Centre, which interprets the history of the quarries and limestone in the area through displays and exhibits and which can be rented by business and other meeting groups;
- interpretive trails marked by signs and plaques;
- extensive day-use and sports facilities, including Kinsmen Lake (a former quarry used for swimming in the summer and skating in the winter), ball diamonds, a beach area around another "lake", a picnic area and horseshoe pits; and
- a campground which offers 110 serviced sites to visitors and residents between 01 May and 30 September.

The Park is owned and managed by the Town. In 1995, it attracted approximately 105,000 visitors, a level in line with previous years. An estimated 62,000 visitors entered the Centre (24,000 as a first stop and the others as a secondary stop). The Park attracts approximately 10,000 student visitors each year as part of school visits. The Park's biggest draw is from Winnipeg and the VFR (visiting friends and relatives) market is very important.

Prior to 1996, the Park had two permanent employees, the Park Manager and a senior interpreter. Now, the Manager and part-time job re-entry employees (nine in 1996) staff the Park; also, some summer student employment is generated through matching government funding.

The Park receives no operating grants other than a small ($3,000) Provincial museum operating grant. The Park no longer charges admission (as of this year) but does charge

school visit groups. The Town's Council has directed the Manager to operate the Park on a break-even or better basis as soon as possible. Key revenue sources are the campground, which is very profitable, school visits and business rentals. The operation of Kinsmen Lake is not a profit centre, nor does its attached food concession generate significant lease revenue.

The Park operates seven days per week from 01 May to Labour Day (from 11 a.m. to 5 p.m.) and Saturday and Sunday afternoons during the rest of the year. A large proportion of the school group visits take place during a six-week period at the end of the school year.

Future plans include:

- upgrading of the walking trails;
- transferring more of the interpretive program outside of the Centre in order to encourage more and longer self-guided tours, including provision of an outdoor brochure rack, better signage and more interpretive panels;
- provision of "Walkman"-recorded tours of the Park and the Town (including vignettes on special persons and buildings); and
- when funds are available, provision of more interactive displays.

It is noted that the Manager recommended strongly that the Claybank project tie its interpretive program to specific areas of the school curriculum in Saskatchewan. At Stonewall Quarry Park, approximately 80% of the student visitors are in Grade 5 and almost all of the others are in Grade 7.

Marketing efforts include participation in regional (Interlake and Winnipeg regions) tourism promotion campaigns and more emphasis on joint marketing opportunities with such neighbouring attractions as Oak Hammock Marsh, operated by Ducks Unlimited and located twenty kilometres east of the Park. The Park's Manager has already recognized the desirability of developing day-long "loops" which incorporate historical, natural and recreational attractions for visitors.

2.3.3 Medalta Potteries Museum, Medicine Hat, Alberta

Medalta Potteries of Medicine Hat operated for close to fifty years as western Canada's largest producer of household crockery and hotel china. In the first half of this century, it was Canada's most important pottery manufacturer. Most of its building and industrial equipment have survived for restoration and interpretation of the history of the company

and industry. The availability of abundant and inexpensive clay and natural gas resources were key to the company's success.

Medalta Stoneware Ltd. commenced production in 1916 (its predecessor started in business in 1912), and ceased operation in 1954 as the country's last major industrial pottery manufacturer. During the 1970's, a group of local residents became involved in preserving the history and site of the company and formed the Friends of Medalta Society in 1986, one year after the site received designation as a National Historic Site. The mandate of the Society is to preserve and restore the Medalta potteries as a living / working museum for the benefit of all Canadians and other visitors. The Society now has more than 1,000 active members.

In 1992, the facilities of the former Hycroft China company were donated to the Society and are located next to the Medalta site. The Society operates the Clay Products Interpretive Centre in the Hycroft building; interpretive programming also includes a walking tour of the Hycroft site around the building. The Museum / Centre interprets the history of the companies, people, equipment and products made by the industry in southern Alberta in the early and middle parts of this century. Also, a working pottery uses original equipment to demonstrate processes used by the industry in the past.

The Museum is located less than ten minutes from downtown Medicine hat and close to the Trans-Canada Highway. It is open to the public from May until October. During the peak summer tourist season, visitors are offered:

- guided tours of the Centre and surrounding site;
- descriptions of small-scale ceramic production in the Centre; and
- large displays of a wide variety of products (very small to very large) manufactured by several companies in the area in the past; some products are available for sale in the Centre's gift shop (it is noted that products of the Medalta period are also on display at the Glenbow Museum in Calgary).

The Society, which operates the Centre / Museum, has also received funding to restore the historic Medalta plant. The five-year project, which has faced environmental and other setbacks, has received funding from Parks Canada ($50,000 per year for five years) and the Alberta Historical Resources Foundation ($75,000 for restoration in 1996 under a policy that sets the grant annually; the Foundation also provided $60,000 for restoration of the Hycroft building and site in 1996). No private dollars have been received for the project.

The Society and the Centre have only one full-time employee and depend heavily on volunteers to staff the Centre during its operating season. Accordingly, it is operated on a small budget, with revenues generated from admissions (three dollars per person, two

dollars per group member), concessions, sales of historical products, sales of three books written by a Calgary-based pottery expert and 50% of the admission revenues of a wax museum located in the Centre. A successful fund-raising program has been in place for several years, by which area residents and others can purchase a brick for thirty dollars to support the Society.

Attendance in 1995 was approximately 8,700 visitors and is expected to increase somewhat in 1996. No tours of the Medalta site will be offered until restoration is at least close to complete. The Centre attracts approximately one bus tour per week in the summer. The Medicine Hat tourism information centre is an important source of visitors; good signage compensates for difficult access to the Centre. A modest school program is offered in the May - June and early fall periods. The Centre is unheated in the winter, which makes school tours impossible.

Based upon the breakdown of visitors who sign the Centre's guest book (not all visitors do sign, of course), 27% of visitors are local / area residents, 32% are other Albertans, 19% come from B.C. and Saskatchewan, 10% come from Montana and other states, 9% are Canadians from east of Saskatchewan and 4% are from countries other than Canada and the U.S.A.

No projections have been made by the Society of the impact of the Medalta site restoration on future attendance. Future plans of the Society include addressing the need for a master plan of the Hycroft / Medalta site and facilities, publication of a newsletter and attempts to develop better joint marketing with other tourism associations and attractions.

2.3.4 McLean Mill National Historic Site, Port Alberni, British Columbia

Port Alberni has a population of approximately 20,000 and is located approximately 200 km north of Victoria. The McLean Mill is a 1920's-era steam-operated sawmill built and operated by the McLean family from 1927. The principal themes of the facility are sawmilling, family business, the contribution of labour and transportation related to logging and milling.

Most of the original machinery in the mill is still intact and in working condition. Besides the mill, the original deck used for sorting and storage of lumber and for hauling to rail cars or trucks is still in place.

The site is owned by the City of Port Alberni and managed by its Parks Department. It is open year-round, in part because of the area's climate and the growth in four-season tourism on Vancouver Island. From 01 July through Labour Day, the site is open seven days a week; from Labour Day until 30 June, it operates Monday through Friday, for

seven hours per day. Guided tours are available on Tuesday and Friday afternoons (one tour per day). No admission is charged at this time but donations are accepted.

Major restoration and development of the site as a heritage tourism attraction is now underway. The total capital budget of the project is now estimated at $7 million over five years and the Department is close to its financing target. Parks Canada, the Province of British Columbia and the City have all committed funds to the project.

At present, the limited visitor tour program reflects the fact that much restoration needs to be done. It is expected that close to full-scale visitor tours will be offered in three years, once a significant portion of the restoration has been completed. At that time, the facility will start charging admission (probably an average of five dollars per person).

Attendance projections developed prior to successful financial packaging are for 130,000 visitors per year by its early years of full-scale operation. The growth in the year-round population and the number of seasonal residents on the Island, the growth in four-season tourism, the Proximity of Port Alberni to Pacific Rim National Park (which attracts an estimated 700,000 to 800,000 visitors each year) and such tourism centres / destinations as Tofino and Ucluelet (where whale watching has become a major attraction for visitors from around the world) justify the optimism of the agencies involved in funding and operating this facility. In addition, the conversion of the traditional logging / milling economy of the Island to other activities, such as tourism, has been a factor in the large investment approved by governments.

Programming planned for the restored facility includes sawmilling demonstrations, loggers' games and events and interpretation of the history and future of the logging / milling industry.

The City has operated the site as a modest attraction since 1991 and the site has attracted 7,000 to 8,000 visitors annually in recent years. Because of the limited programming and tour opportunities in the pre-restoration period, the Department has done little promotion of the site.

Once restoration is well advanced, marketing efforts will include joint promotions with regional attractions such as Chemainus (murals), Duncan (Native Heritage Centre), the National Park and the above-mentioned neighbouring communities and facilities in the Victoria area.

The Department has been directed to operate the facility on at least a break-even basis as soon as possible. Besides admission revenues, the site will generate income from a gift shop, restaurant in the mill's original cook house and the organizing of special events. Any operating deficits must be covered by the City.

2.4 OTHER HISTORIC / HERITAGE SITES

2.4.1 Saskatchewan

Attendance statistics presented in Table 2-1 indicate that visits to historic sites have remained flat or declined over the past five years. Many facilities reported strong attendance levels in 1992 and some have experienced reductions since. As in other jurisdictions, budget costs may have affected attendance because of reduced operating hours / days, staffing and/or promotion budgets. Peak-season weather conditions are also a factor.

Wanuskewin Heritage Park (a National Historic Site in Saskatoon, operated by an independent organization) experienced total 1995 visitation of 80,000 to 90,000. The origin of visitors is generally broken down as follows:

- local / area residents: 35%
- other Saskatchewan residents: 45%
- non-Saskatchewan residents: 20%

TABLE 2-1: ATTENDANCE STATISTICS SELECTED HISTORIC PARKS (1991 - 1995)

Facility	1991	1993	1995
Provincially-Operated Historic Parks			
Cannington Manor	8,100	7,300	8,800
Fort Carlton	13,900	10,700	10,100
All Historic Parks (5)	26,600	24,000	24,500
Federally-Operated National Historic Sites			
Batoche	32,700	30,300	24,100
Fort Battleford	9,300	10,100	8,800
Fort Walsh	19,600	17,800	18,300

2.4.2 Manitoba

Recent levels of annual attendance at a sample of historic sites in Manitoba are as follows:

- Lower Fort Garry National Historic Park (25 km north of Winnipeg): 90,000 to 100,000
- Marine Museum of Manitoba (35 km north of Winnipeg in Selkirk, offering outdoor displays of ships and boats): 18,000
- Hecla Village (a replica of an Icelandic village in Hecla Provincial Park, 160 km north of Winnipeg): 4,000 to 5,000

No admission is charged to visitors to the latter two attractions.

2.4.3 Alberta

Recent attendance levels at Alberta historic sites also demonstrate static or declining levels of visits (Table 2-2). As in other jurisdictions, weather and budget factors may play a role, and their longer-term impact will be better determined over the next few years.

TABLE 2-2: ATTENDANCE STATISTICS
SELECTED ALBERTA HISTORIC SITES (1993/94 - 1995/96)

Facility	1993/94	1995/96
Remington - Alberta Carriage Centre (carriage industry) - Cardston, 20 km north of Waterton Lakes National Park	64,700	34,600
Frank Slide Interpretive Centre / Leitch Collieries (coal mining) - Crowsnest Pass, 130 km west of Lethbridge	69,300	56,000
Fort McMurray Oil Sands Interpretive Centre - 440 km northeast of Edmonton	29,500	25,200
All Provincially-Operated Historic Sites (15)	524,700	425,000
Royal Tyrrell Museum - Drumheller, 140 km east of Calgary	444,900	374,100

2.5 INFORMATION ON WORLD HERITAGE SITES

The possible future designation of the Claybank Brick Plant as a World Heritage Site by UNESCO could have a significantly positive impact on the Plant's profile as a regional tourist attraction, as well as on the potential availability of capital and operating funds to ensure its appropriate level of development and ongoing operation.

The consulting team has reviewed available information on the more than 500 sites already on UNESCO's World Heritage List and the following findings appear to be very promising with respect to the possible success of the Claybank Plant's application:

- only a small number (fewer than eight) solely industrial heritage sites have already been designated, all in Europe and none in North America; no information was available with respect to candidate projects now under review by UNESCO
- no brick industry sites have been designated to date
- all solely industrial heritage sites on the List have been designated within the past five or six years, which indicates that UNESCO and national nominating bodies have begun to recognize the heritage significance of, and the importance of preserving, industrial heritage sites
- two criteria identified by a number of Listed industrial heritage sites as being important to their successful designation are their uniqueness as to heritage / historical significance and their state of preservation; the Claybank Brick Plant's proponents will have no difficulty advancing both arguments effectively.

In addition, the consulting team discussed the potential attendance / visitor impact of World Heritage Site designation with persons involved in managing, or knowledgeable about, four sites on the World Heritage List in North America. The results of these discussions are set out below.

2.5.1 Head-Smashed-In Buffalo Jump Interpretive Centre, Alberta

The Manager of the Centre (designated in 1981) believes that the impact of World Heritage Site designation of the Centre / site's attendance levels in recent years is not significant compared to the popularity of aboriginal culture among tourist markets. Head-Smashed-In is Alberta's second most popular attraction after the Royal Tyrrell Museum.

However, he indicated that the World Heritage Site designation undoubtedly contributed to the attraction's high annual attendance, and to the fact that more than forty per cent of its visitors originate from outside Canada. Head-Smashed-In's continued popularity is demonstrated by the estimate that 85% of its visitors are there for the first time. He believes that the prestige of World Heritage Site designation is positive for the Centre but is not able to define how it has translated into additional visitors.

He indicated, when told by the consulting team what level of attendance they have projected for the Claybank Brick Plant project, that in his opinion, the impact of World Heritage Site designation for the Brick Plant could be to increase annual attendance to up to 20,000 visitors per year.

2.5.2 "Le Vieux Quebec", Quebec City

An official with the city's tourism bureau (the city's historic district was designated in 1985) stated that World Heritage Site designation was promoted heavily for seven or eight years and tourism has continued to grow steadily, including strong levels of tourism from Europe. Surveys show that the city's historic district and heritage significance are important visit motivators for visitors to the city.

The city's heritage character assumes greater importance to the local tourism industry, she indicated, because of changes in the city's traditionally strong convention market; despite the opening of the new convention centre in 1996 and an increase in the number of conventions attracted, the number of visitors per convention and their average length of stay have both declined significantly.

2.5.3 "Old Town Lunenburg", Nova Scotia

In 1995, UNESCO designated Lunenburg's Old Town as a World Heritage Site. Two persons provided information to the consulting team during interviews.

The Town official responsible for its successful World Heritage Site designation application believes that it will take at least three years to judge the impact of designation on tourism levels but he said that the community has already seen an increase in interest and actual visits. Lunenburg has benefited from increased publicity since designation, including the American Broadcasting Company's "Good Morning, America" show which used Lunenburg as a location for a full show, the New York Times travel section and an article in Reader's Digest.

Also, the tourism office has received a greater number of requests for information on Lunenburg, and predicts a ten per cent increase in visits in 1997, based upon enquiries received. She identified new markets contacting the Museum for information since World Heritage Site designation as tourists with special interests in architecture and in visiting heritage-significant communities.

Designation and its attendant publicity has also led to new enquiries concerning the possible use of the town's historic areas for movie and television production locations.

2.5.4 Taos Pueblo, Taos, New Mexico

This historic district was designated in 1992. While no data directly link World Heritage Site designation and the level of tourism at Taos, the official contacted with the Pueblo Cultural Center's office in Taos indicated that the site has experienced a continued increase in visitors (to a presently unmanageable volume of 5,000 visitors per day between late March and late October). The percentage of European and Asian-origin visitors has risen significantly in recent years. Interest in aboriginal cultures within these markets is strong.

This unexpected level of peak-season tourism has raised concerns of historic resource deterioration and disruption to permanent residents' daily lives. Construction of a visitor centre to orient and better control the itinerary and behaviour of visitors to the Taos Pueblo is now under active consideration.

2.6 TRENDS IN HERITAGE TOURISM

The importance of heritage (particularly nature-based and history-related) tourism in Canada has been researched and recognized for many years. A 1990 survey coordinated by Longwoods, an internationally recognized travel research firm, found that:

- 57% of American visitors to Canada visit historic sites during their stay; and
- 67% of Japanese and European visitors do the same.

Americans from Montana, North Dakota and Minnesota visiting Saskatchewan in the early 1980's, surveyed as to their favourite activities, named "visits to historic sites / museums" in 85% of their responses ("rural sightseeing" was noted 79% of the time).

Alberta and Manitoba-based visitors to Saskatchewan (who represent a large majority of Canadian visitors to the province) both rank visits to historic sites relatively "high" when surveyed as to important travel motivators during their visits to Saskatchewan.

The 1994 Canadian Travel Survey found, with respect to Canadians' travel in Canada, that:

- 40% of all Canadian domestic trips include a cultural and/or natural heritage experience;
- 75% of those surveyed expressed interest in a future trip including history / heritage activity;
- by far the majority of visits of a heritage tourism nature by Canadians are by travellers / tourists within their own province;
- historic sites are by far the most visited cultural attractions; and
- ecotourists often express an interest in, and do also visit, cultural heritage attractions.

The 1994 Canadian Travel Survey further spotlighted the growing fall-season tourism market in Canada:

- fall tourists often express interest in culturally-oriented trips;
- "visiting friends and relatives" is a strong trip motivator;
- an estimated 2.2 million fall trips were taken by Canadians;
- one-third of these travellers are at least 60 years old; and
- active seniors are often interested in culture and history.

It should, however, be noted that there is a significant divergence between expression of interest and actual behaviour / activity on the part of residents of Saskatchewan and Manitoba - 80% express an "interest" or "strong interest" in visiting historic sites (behind only "visits to parks") but such activity / behaviour data show Prairie residents' visits to historic sites do not rank in the top four activities.

In 1994, the Canadian Tourism Research Institute (CTRI) forecast that:

- visits to historic sites will grow by 2 - 3% per year in Canada in the 1990's (c.f. 2 - 5% annual growth in overall Canadian overnight domestic travel);
- steady growth in Europeans' visits to Canada will continue; and
- overseas visitors to Canada will visit historic sites relatively more than Canadians or Americans travelling in Canada.

The CTRI identified three key market segments of potential significance to the heritage tourism sector:

- the growing and maturing "getaway" market (especially on weekends); its two most popular activities are, respectively, visiting friends and relatives and attending events;
- the Canadian outbound market (Canadians travelling outside Canada) - 24% of their trips are history and/or culture-oriented (the most popular activity for this group); and
- seniors: a growing market with time, money and interests in the past and in cultural activities (including the important bus tour market).

2.7 IMPLICATIONS FOR THE CLAYBANK PROJECT

A preliminary analysis of the information obtained for this section of the report leads to the following comments as to possible implications for the Claybank project:

1. The uniqueness factor - the apparent potential of the Claybank Brick Plant as probably the only single-theme, single-purpose brick manufacturing interpretive site in North America - is positive and important.
2. Generally, the history of the brick industry has been as neglected as have its historic facilities, despite the industry's role and importance in the growth of cities, towns and industry in Canada and the United States. A gap in interpretive facilities and programming is apparent.

3. Economic realities confront the heritage tourism sector:

   - scarce funds for capital investment in new and expanded facilities, compared to previous decades;

   - high priority by facility operators and planners to minimizing or eliminating operating deficits and resulting subsidies; and

   - the need to innovate to respond to these constraints: shrewd fund-raising and financial packaging; compromising purity of theme or use to generate additional revenue or even to make the project possible; and aggressive marketing strategies with small budgets, to "piggyback" on other tourist attractions and destinations.

4. Market / financial projections must take into account the possible impacts of bad weather and tight operating and marketing budgets - realism is critical.

5. The significant variance between tourist intentions and actual behaviour with respect to visiting historic sites suggests, in part, that better marketing programs are needed.

6. Marketing programs should seek to attract special "niche" markets who have an apparent propensity to include cultural activities - seniors, bus tour groups in general, overseas visitors, ecotourists and weekend and fall-season travellers.

7. The importance of "visiting friends and relatives" as a reason tourists visit Saskatchewan must be considered in promoting historic sites to residents of the province, especially in urban centres nearby.

8. Should the Claybank Brick Plant be designated as a World Heritage Site by UNESCO, major attendance and revenue impacts could be anticipated, as will be discussed in Section 5.6.2.

3. AREA / REGION TOURISM OVERVIEW

3.1 OBJECTIVES AND APPROACH

Because the potential viability of an individual tourism attraction is tied, at least in part, to the present and potential ability of the surrounding area and region to draw and hold visitors and tourists - who are potential visitors to the attraction, as is the permanent population of the area / region in question - it is important to gain an understanding of levels, patterns and trends in tourism in the area / region.

In order to determine the potential fit between the Claybank Brick Plant as a tourist attraction with its surrounding area / region, the consulting team has:

- reviewed available statistics on tourism demand and behaviour of tourists and visitors to the region;
- compiled a concise inventory of attractions, accommodations and events in the region; and
- prepared a summary evaluation of the region's strengths and weaknesses as a tourism destination and stopover location and of the potential fit between the Claybank project and its surrounding area.

Because of the low population and limited tourism base in the immediate area surrounding the Claybank Brick Plant, the consulting team has defined the project's key area, in terms of primary market population and complementary attractions, as having an eighty-kilometre radius around Claybank. This area includes:

- Regina (population of 180,000)
- Moose Jaw (34,000)
- Assiniboia (2,800)
- Lumsden (1,500)
- White City (900)
- Milestone (600)
- Pense (600)
- Bengough (500)
- Rouleau (500)
- Willow Bunch (500)
- Avonlea (400)
- Bethune (400)

- Mossbank (400)
- Ogema (400)
- Buffalo Pound Provincial Park
- Dunnet Regional Park

3.2 AREA TOURISM BASE

In keeping with the importance of the two large urban centres within the area defined by the consulting team, the supply of modern hotel / motel accommodations is heavily weighted to these two centres, as illustrated in Table 3-1. It is also noted that there are three bed and breakfast operations and an international hostel facility in Regina and one bed and breakfast operation in Moose Jaw. Only one vacation farm operates in the area, east of Mossbank.

TABLE 3-1: MODERN HOTEL / MOTEL ACCOMMODATIONS

COMMUNITY	NO. OF ESTABLISHMENTS	NO. OF MODERN ROOMS
Avonlea	1	8
Bengough	1	28
Moose Jaw	12	466
Ogema	1	10
Pense	1	6
Regina	22	2,650
Rouleau	1	5
Wilcox	1	6
TOTALS	**40**	**3,179**

The supply of serviced campground sites is much more evenly distributed around the area, as shown in Table 3-2.

TABLE 3-2: CAMPSITE ACCOMMODATIONS				
NAME	NUMBER OF SITES			
	Total	Elec. Serv.	Elec./Water Serviced	Elec./Water/ Sewer Serv.
Assiniboia Regional Park	17	15		
Bengough Regional Park	16	16		
Besant Trans Canada Campground	100	38		
Buffalo Lookout Campground	43	12		27
Buffalo Pound Provincial Park	202	100		
Dunnet Regional Park	100	50		
Kings' Acres Campground	98	48		50
Milestone Campground	10		10	
Ogema Regional Park	33	8		
Oro Lake Regional Park	35	10		
Prairie Oasis Campground	100		40	60
Sherwood Forest Country Club	30		20	
TOTALS	784	297	70	137

Table 3-3 represents a preliminary evaluation of tourist attractions in the area defined by the consulting team. This evaluation rates the attractions in terms of:

- their potential as complementary attractions to the Claybank project; and
- their potential impact on visitation levels with respect to marketing and packaging linkages to the Claybank project.

In both cases, this preliminary evaluation is made according to a scale ranging from **high (H)**, through **moderate (M)**, to **low (L)**. Factors such as similarity of theme or likely target markets, proximity, volume of attendance / visitors and special joint-marketing opportunities have been considered in the ratings assigned. Potential marketing impact

does not always correspond to required spending; in the case of some linkages, low-cost promotions focussed on specific events or programs could generate cost-effective promotion of the Claybank project.

TABLE 3-3: PRELIMINARY EVALUATION OF AREA TOURIST ATTRACTIONS

LOCATION / Attraction	Complementary Potential	Marketing Linkage Impact Potential
ASSINIBOIA: museum	M	L
AVONLEA: museum	M	L
BUFFALO POUND: bisons / nature	M	M
DUNNET PARK: golf course / nature	M	H
MOSSBANK: museum / pet farm	M	L
WILCOX: Notre Dame / museum	M	M
BRIERCREST: museum	M	L
REGINA:		
Casino Regina (bus tours / seniors)	L	H
Ducks Unlimited Nature Watch Self-Drive Tours	M	H
Government House	H	M
Heritage Regina Tours	H	M
Nature Saskatchewan Tours	M	M
North-West Territorial Building	H	L
RCMP Centennial Museum	H	H
Regina Plains Museum	M	M
Saskatchewan History and Folklore Society Tours	H	M
Diefenbaker Homestead	H	H

TABLE 3-3: PRELIMINARY EVALUATION OF AREA TOURIST ATTRACTIONS		
LOCATION / Attraction	**Complementary Potential**	**Marketing Linkage Impact Potential**
Legislative Building	H	H
Royal Saskatchewan Museum	H	H
Saskatchewan Science Centre	H	H
International Children's Festival (June visitors / groups)	L	M
Western Canada Farm Progress Show (June visitors)	L	M
Trial of Louis Riel	M	H
Industrial tours at upgrader / refinery	L	M
MOOSE JAW		
Art Museum	M	M
Murals	H	H
Sukanen Ship / Village / Museum	M	M
Temple Gardens Mineral Spa	H	H
Tunnels of Little Chicago	H	H
Western Development Museum (history of transportation)	M	H
Wakamow Valley	M	M
Walking Tours of Downtown	H	H
Hometown Fair (June)	M	H
Saskatchewan Air Show (July)	L	H

Beyond the defined tourism area, several other attractions in the province have potential as thematic and/or marketing links to the Claybank project (refer to Table 3-4).

TABLE 3-4: OTHER SASKATCHEWAN ATTRACTIONS WITH POTENTIAL THEMATIC AND/OR MARKETING LINKS TO THE CLAYBANK PROJECT			
Community	**Attraction**	**Distance From Claybank**	**Potential**
Maple Creek	Fort Walsh National Historic Site	425 km	■
Maple Creek	Cypress Hills Interprovincial Park	400 km	□
Maple Creek	Jasper Cultural and Historical Centre	375 km	○
Swift Current	Doc's Town (historical village); Museum	235 km	□
Herbert	Museum	195 km	□
Morse	Museum / Cultural Centre	180 km	□
Chaplin	Sask. Minerals Corporation Tours (up to 300 persons per year)	150 km	□
Carlyle	Cannington Manor Provincial Historic Park	275 km	□
Whitewood	Chopping House (antiques, collectibles)	270 km	□
Saskatoon	Meewasin Valley facilities	350 km	○
Saskatoon	Ukraina Museum	350 km	□
Saskatoon	Saskatchewan Railway Museum	350 km	□
Saskatoon	Diefenbaker Centre	350 km	□
Saskatoon	Wanuskewin Heritage Park	350 km	■
Saskatoon	Western Development Museum (1910 Boomtown)	350 km	■

Legend ■ **Key Attraction**

□ **Valuable Attraction**

○ **Significant Attraction**

Among the possible half-day to full-day tour loops which could be promoted to area visitors (and which could include the Claybank Plant) are:

1. Moose Jaw - Claybank - Avonlea, then going either through the Dirt Hills and Cactus Hills back to Moose Jaw, or to Wilcox - Rouleau - Moose Jaw.

2. Regina - Wilcox - Avonlea - Claybank - Briercrest - Regina.

3. From the Red Coat Trail (Highway #13) coming from either direction, and north on Highway #334.

4. From the Trans-Canada Highway (#1) coming from either direction, and south on Highways #39 and #339.

5. A history loop: Regina - Wilcox - Claybank - Moose Jaw - Regina (one-day or two-day tours, with a possible overnight in Moose Jaw).

6. Nature / history loops from Moose Jaw and Regina, and including scenic routes, some nature viewing areas and two or three historic sites.

Given the potential importance of the Claybank project to the *Great Trails Getaway Tourism Region* (south-central Saskatchewan), key links to the south of Claybank include:

1. The Highway #13 corridor: Cannington Manor; St. Victor Petroglyphs Provincial Historic Park; Wood Mountain Provincial Historic Park; Grasslands National Park; Cypress Hills Interprovincial Park; Fort Walsh National Historic Site.

2. At least four of the six *Great Trails* promoted within the region through its organization's tourism information material.

It is noted that a "Heritage Trail Committee" has been struck to organize a tour loop including Wilcox, Highway 39, Claybank and other area sites and attractions. A preliminary inventory of attractions and other items of potential interest to visitors has been completed but no further work has been undertaken to date.

3.3 TOURISM MARKET DEMAND AND BEHAVIOUR

The 1992 regional tourism strategy carried out for south-central Saskatchewan by Anderson Fast & Associates provided the following data on visitors to the large region (southwest Saskatchewan, for the purpose of collecting statistics for the Canadian Travel Surveys) that includes Claybank:

- non-resident travel to this region (by residents of British Columbia, Alberta, Manitoba and Ontario) can be characterized as follows:
  - over 90% of visitors travel by car
  - 75% of their visits involve visiting friends and relatives
  - camping has grown in relative importance as the form of accommodation
  - nearly one-half of visiting groups have children
  - nearly one-half of visits are for two to three nights

- with respect to intraprovincial travel in the region (Saskatchewan residents):
  - more than 95% travel by car
  - about one-half of visits involve visiting friends and relatives
  - fewer than ten per cent involve visits to parks or historic sites
  - visit groups are younger than non-resident visitors
  - group size is frequently three to four persons but there are many couples
  - 40% of overnight trips are on weekends
  - 60% of all trips to the region by Saskatchewan residents are same-day trips

The permanent population of the defined area is important as a preliminary indicator of potential market demand for the Claybank project because:

- the visiting friends and relatives (VFR) market is demonstrated to be important to the provincial tourism industry; permanent residents host their visitors and can take them or direct them to Claybank;
- day trips and weekend trips are most often made by nearby residents;
- summer and fall tour loops to attract area residents can include Claybank;
- joint marketing activities with other area attractions can also aim at permanent residents; and
- school tour groups are an important potential market for historic sites, not only for their visits as school groups but also because many of the children can be expected to bring their families to see the site (assuming a positive initial experience).

Data from the 1991 Census of Canada show the following:

- total population:
  - 0 - 80 km radius around Claybank: 91,000 households
    241,000 population
    (24% of province)
  - 0 - 280 km radius: 273,000 households
    719,000 population
    (73% of province)
- school-age population:
  - 0 - 80 km radius: 5 - 19 years: 53,000
    10 - 14 years: 18,000
- 55 - 74 years of age:
  - 0 - 80 km radius: 37,000
- couples with no children:
  - 0 - 280 km radius: 70,000 persons (35,000 couples)

Highway traffic counts / statistics are indicators of general traffic volumes and of traffic relative to tourism. As a rule of thumb, average daily traffic volumes are 25% to 35% higher in peak summer travel periods than the average annual volumes, especially on major corridors like the Trans-Canada Highway (#1). Part of that seasonal increase in daily volume is tourist traffic.

Also, highway traffic data are useful to tourism operators as indicators of best locations for signage, placement of brochures and joint marketing priorities with respect to other attractions.

The counts made by Saskatchewan Highways and Transportation for key measuring points in the area defined, by the consulting team, around Claybank include the annual average daily traffic volumes shown in Table 3-5:

TABLE 3-5: AVERAGE ANNUAL DAILY TRAFFIC VOLUMES - SELECTED HIGHWAYS

Highway, Location	1990	1993	1995
Highway #1, east of #6 (Regina)	17,000	19,400	19,800
Highway #1, west of #6 (Regina)	10,500	10,100	10,300
Highway #1, east of # 39 (east of Moose Jaw)	6,700	7,500	7,000
Highway #1, west of #39	7,500	8,500	8,800
Highway #6, at junction with #39	2,500	2,800	2,500
Highway #39, at junction with #6	2,300	2,500	2,800
Highway #339, east of Claybank			330
Highway #339, west of Claybank			205

Data from the 1994 Canadian Travel Survey demonstrate the importance of Regina (a separate region under the CTS) as a tourism destination; the proximity of Claybank (a driving distance of under 100 km) is a positive factor for potential diversion of Regina residents and tourists to the Claybank project. Table 3-6 presents some of the key indicators of the potential importance of Regina to the project.

TABLE 3-6: SELECTED TOURISM ACTIVITY INDICATORS - REGINA		
Indicator	**Visitors to Regina**	
	Saskatchewan Residents	**Other Canadians**
Same-day Trips	770,000	20,000
Overnight Trips	451,000	183,000
% of Overnight Trips Between 01 June and 30 September	29%	40%
Average Party Size (Overnight Visitors)	2.3	2.7

It is noted that attendance estimates for 1996 at the Claybank Brick Plant, based upon a prize draw box and cash donation receipts, increased dramatically in 1996 compared to 1995; it is estimated that more than 625 persons visited the plant this year. The Claybank Brick Plant Historical Society offered guided tours on Saturdays and Sundays from 15 June to 15 August (between 10:00 a.m. and 4:00 p.m.). The Society noticed that brochure placement at the Spa in Moose Jaw and an article in the *Regina Sun* (Sunday tabloid) generated significant numbers of visitors.

In order to capitalize in 1997 on the publicity already generated in the area, the Society plans to offer trail rides starting in May, with up to eighteen horses available to visitors. Also, a bed and breakfast in the brick house and cottage on-site are being planned for next year.

4. PROJECT DEVELOPMENT OPTIONS

4.1 INITIAL DEFINITION OF OPTIONS

The Terms of Reference for this study suggested three potential levels of development that should form the basis for assessing the feasibility of developing and operating the Claybank Brick Plant National Historic Site as a viable tourism attraction. These development options are as follows:

Level 1: Stabilized Ruins, Self-Guided Tours

Basic stabilization - i.e. repointing of exterior brickwork, reroofing, site cleanup, undertaking basic safety precautions for visitors - is the least level of development contemplated. Self-guided tours would be available upon request. No visitor amenities would be provided, with the possible exception of rudimentary washrooms.

Level 2: Rehabilitated Buildings, Guided tours With Working Demonstrations

At this level, all buildings would be substantially rehabilitated. Interpretive tour guides would be available on a seasonal basis - i.e. mid-June through Labour Day long weekend, and some basic visitor amenities would be offered. Working demonstrations of various aspects of the brick manufacturing process, possibly involving former employees, would be a prominent feature.

Level 3: Rehabilitated Buildings, Guided Tours, Numerous Working Demonstrations (but no brick firing) and a Visitor Reception Centre

This level of development would feature substantially rehabilitated buildings, guided tours available on a seasonal basis, demonstrations of virtually every aspect of brick manufacturing short of actually firing the bricks, a Visitor Reception Centre featuring a gift shop, interpretive area and possibly a small archives / research area.

4.2 KEY SITE ATTRIBUTES

Review of existing documentation related to the brick plant site, in association with a brief reconnaissance of the plant and site, suggests that there are a number of potential interpretive opportunities available for exploitation and, in that context, certain key buildings / facilities on-site.

4.2.1 Major Interpretive Opportunities

The primary identified interpretive opportunities at the site relate to the following:

- description of the entire brick manufacturing process;
- the brick industry in Saskatchewan, historically and today, and the evolution of the brick industry elsewhere;
- why a brick plant at Claybank?
- the wide variety of specialized clay products (and their uses and significance) that were manufactured at the plant;
- links to western (and beyond) Canadian urban architecture and the significant buildings that were constructed of Claybank brick;
- impacts of technological change both on the manufacturing process (and thus the supply of product) at the plant and on the demand for product;
- key personalities and their roles through the life of the plant; and
- interesting employee stories; the relationship of the plant to the local area and its economy.

Other opportunities are certainly available. The degree to which these and other opportunities are exploited depends both on the level of development that ultimately occurs and on the interpretive theme(s) (i.e. the "window(s)" through which, or perspective(s) from which, the interpretive stories are told) selected for the project. Interpretive theme selection and interpretive program development are beyond the scope of this study; indeed they are the subject of a significant phase later in the planning process.

4.2.2 Key Buildings / Facilities / Areas

Given the interpretive opportunities noted above, a number of the buildings, structures and areas on the brick plant site are considered to be of key significance. They are as follows:

- **bunk house** - with potential to serve a number of functions, including Visitor Reception Centre, interpretive orientation and reinforcement location, administration, concessions
- **clay pits** - with trails from the plant to the pits
- **clay storage / crusher area**
- **brick press area**
- **brick transfer area**
- **machine shop**
- **hand moulding area**
- **carpentry shop** - where hand moulds were produced
- **hot floor / tunnel dryers / transfer system**
- **kilns** - 2 or 3
- **stock sheds / rail car loading area**

Other buildings / areas on-site, although not identified as key, are expected to serve the role of providing a more complete site context for interpretive programming. Indeed, it is understood that the Claybank Brick Plant Historical Society is currently using, and plans additional use of, two of the managers' houses east of the plant for related programming purposes (i.e. tea house and bed and breakfast operation) and that the Society intends to offer trail rides on the site in 1997, which could present significant tourism potential (especially for school groups, young families, couples and active seniors). Nevertheless, the buildings, facilities and areas not listed above are not seen as being of primary importance from an interpretive programming perspective.

4.3 REVISED DESCRIPTION OF DEVELOPMENT OPTIONS

Based on the preceding review of comparable attractions, on the geographic situation of the site, on identified tourism development and activity in the surrounding region and on the consulting team's previous experience with and understanding of successful tourism attractions, some revision is recommended to the definition of the three development options to be used as the basis for assessing financial feasibility of the project. The following sets out the recommended development option descriptions.

4.3.1 Level 1

Though still the basic development option, Level 1 development is recommended to include some functions / elements not considered in the Terms of Reference. Most notable among the recommended additions is the inclusion of a modest visitor centre function on-site. Some form of visitor centre is a critical element in successful tourism attractions with a significant interpretive component, as the centre provides:

- visitor orientation to, and reinforcement, of the key interpretive messages;
- a single "entry" and "exit" point to the site and its interpretive offerings, thus facilitating control of visitor flow and behaviour on-site;
- an important opportunity for supplementary revenue generation through gift shop / concession sales;
- an important opportunity to extend the duration of visits to the site;
- a place for visitors to "take a break" from the often extreme climatic conditions typical of the Claybank area during the peak summer tourism season (e.g. blazing hot sun, high temperatures, strong winds) and/or to get a "taste" of the interpretive offerings on-site on days when wet or otherwise inclement weather precludes visits to the actual plant or other areas of interest; and
- a location for administration functions.

Level 1 development is therefore proposed to include the following:

- basic stabilization - i.e. repointing of exterior brickwork, reroofing, site cleanup, undertaking basic safety precautions for visitors
- guided tours on weekend afternoons

- Walkman-guided and/or self-guided tours
- bed and breakfast and trail ride operations
- signage / floor arrows, story boards for interpretation of clay storage / crusher area, brick press, machine shop, transfer area, hand-mould / hot floor area, tunnel dryers
- use of one kiln for video presentation and storyboards (20-minute stay maximum)
- product display in stock sheds
- low-key redevelopment in bunk house:
  - modest "theatre" area (for orientation)
  - possible introductory ten-minute video
  - displays, story boards
  - office / reception (admissions; trail ride tickets; Walkman rentals)
  - possible summer gift shop, snack / drink concession
- outdoor vault privies with low water-use washbasins / taps
- main vehicle entry from east side of property (existing)
- use of existing field area near pond for visitor parking
- operation / staffing:
  - summer operation, 15 June to Labour Day weekend
  - one manager position (five months total - four months full-time, one month half-time)
  - volunteers (especially for conducting weekend tours)
  - four students (times 3.5 months, including overtime)
  - above staffing excludes trail ride and bed and breakfast operations (assumed to be private businesses)

4.3.2 Level 2

The second optional level of development would see a project which builds on all work undertaken for Level 1 development and which provides additional interpretive offerings, visitor services and amenities.

Level 2 development is proposed to include all development outlined for Level 1, plus the following:

- substantial rehabilitation of all key buildings, including significant improvements to lighting and development of visitor rest areas

- enhanced site entry at east end of property

- walking trail to the clay pits south of the plant, and to the west staff house, complete with rest stops and interpretive signage, for both Walkman-guided / self-guided tours and for guided tours

- bunk house further upgraded for longer visits (e.g. more elaborate theatre and video presentations, more static displays)

- upgrade of gift shop to include variety of products, souvenirs, books, etc.

- daily guided tours (five or six tours per day)

- videos / demonstrations (up to two each per day) relating to:

  - clay mining, transport, storage and crushing
  - clay mixing
  - brick pressing
  - production of hand moulds in carpentry shop
  - hand moulding
  - brick transfer from tunnel dryers to kilns
  - simulated partial loading / firing / unloading of a kiln

- picnic area / playground near gravelled visitor parking lot / bunk house

- operations / staffing:

  - open for school group tours 01 to 20 June
  - daily guided tours for the public from mid-June through Labour Day weekend)

- one manager position (10 months full-time): responsible for staff hiring and training, procurement / purchasing, marketing, supervision of site opening and closing and other administrative duties
- volunteers for weekend tours
- ten students (times four months, including overtime)
- above staffing excludes trail ride and bed and breakfast operations (assumed to be private businesses)

4.3.3 Level 3

As with Level 2 development, this level of development would feature substantial rehabilitation of all buildings; in addition, however, there would be significantly higher levels of visitor services, interpretive programming and associated site development.

Level 3 development is proposed to include all development outlined for Level 2, plus the following:

- bunk house / Visitor Reception Centre:
  - full sewer and water servicing, complete with indoor modern washroom facilities
  - full-service restaurant operation (perhaps operated in association with the bed and breakfast operation)
  - interactive interpretive area: brick making
    types of industrial use
    architectural uses
    history of brick making

- upgraded kiln simulations / demonstrations (possible operation of a small - i.e. portable - electric or gas-fired kiln)

- possible visitor participation in hand-moulding process

- operation of some form of "people-mover" on the trail to the clay pits (possibly a horse-drawn wagon, operated by the stand-alone trail ride business)

- relocation of main visitor site access to follow the rail spur from the Village of Claybank to the vicinity of the bunk house / V.R.C.

- operations / staffing:

  - operational season as for Level 2
  - one manager position (year-round full-time): responsible for staff hiring and training, procurement / purchasing, marketing, supervision of site opening and closing and other administrative duties
  - volunteers (weekend tours)
  - 15 to 20 students (times four months including overtime)
  - above staffing excludes trail ride / people-mover, restaurant and bed and breakfast operations (assumed to be private businesses)

At this level of development, incorporation of a research / archives area in the development is also seen as appropriate. Though not a tourism function *per se*, a modest research / archives function would be consistent with the heritage significance of the site and with the level of investment in facilities and services suggested for the Level 3 option.

4.4 PRELIMINARY CAPITAL COST ESTIMATES

The estimation of capital costs at this stage in the planning and development process (i.e. prior to any concept planning for either site development or interpretive program development) is useful only for providing general, order of magnitude cost / budget guidelines. As a matter of necessity, a number of assumptions are required to help form the basis for estimates. These assumptions may or may not hold true as further planning, design and development proceeds.

Capital costs will include the actual costs of stabilization / redevelopment of buildings, site development (including both off-site and on-site signage), development / upgrading of "municipal" services (i.e. sewer and water), interpretive media / equipment and miscellaneous furnishings and equipment (including allowances for design and construction administration / management). In addition, there will be capital costs associated with pre-development planning work (site development master plan, interpretive master plan and program plan) and site work (fire protection, security, etc.). Finally, based on the site reconnaissance undertaken by the consulting team and on findings in previous studies, it would appear that there is a need for some form of geotechnical investigation of the site, to address such issues as floor heaving and alkali buildup on the floors and walls of some of the structures on-site.

Depending on the development option ultimately pursued, there may also be costs associated with land acquisition (e.g. for new visitor access / entry road along the spur line from the Village of Claybank, for sewage lagoon development) and, possibly, associated with acquisition of rights of access and interpretive development in the clay pits to the south of the plant.

As noted, cost estimates have been derived from a number of sources (including previous reports and the consulting team's cost estimates files), although in some instances, "allowances" are based solely on the consulting team's professional judgement.

4.4.1 Exclusions

The following items have been excluded from the capital cost estimates:

- New Careers Corporation work completed to date and planned for the remainder of 1996 / 97 (see 4.4.2 below);
- any stabilization work completed prior to the agreement with New Careers Corporation;
- exterior masonry wall repair and repointing;
- window replacement and repair;
- any detailed site surveys that may be required;
- implementation of any recommendations made in future pre-development investigations and assessments.

4.4.2 New Careers Corporation

It is understood that the Saskatchewan Heritage Foundation has arranged to have certain work undertaken at the brick plant by crews of the New Careers Corporation (N.C.C.). Work that has been completed, or is intended to be completed by the summer of 1997, includes the following:

- shingle the peak-roof portions of the main plant;
- new roof over the machine shop (complete);
- new roof over the carpenter's shop (complete);
- new roof over the bunkhouse (complete);
- new roof over the office (complete, although leaks are still a problem - the building needs additional work before the leaks can be fixed);
- new roof over the boiler area;
- new roof over the brick grinding room (complete);
- window repairs throughout the plant complex;
- new roof over the clay shed (if there are sufficient materials); and
- hardwood floors for the bunk house.

To date, the cost to the Foundation for this work has been:

- $20,000.00 for materials ($12,000.00 for shingles and $8,000.00 for tools and miscellaneous materials); and
- approximately $60,000.00 per year to cover the costs of the crew supervisor's salary and travel expenses to and from the site for the supervisor and a crew of approximately ten individuals.

It is understood that the New Careers Corporation has budgeted up to approximately $250,000.00 per year for crew wages and associated costs. The crew commenced work at the brick plant in mid-August 1996.

4.4.3 Pre-development Investigations, Assessment and Planning

Prior to development, the following investigations, assessments and planning will need to be undertaken:

- Geotechnical Investigation: as recommended by Masson & Villafranca (1996);
- Structural Investigation: as recommended by Masson & Villafranca (1996);
- Architectural Historic Material Investigation: as recommended by Masson & Villafranca (1996);
- Industrial Archaeological Survey: as recommended by Masson & Villafranca (1996);
- Site Development Master Plan: a comprehensive Master Plan, providing a preliminary context for subsequent detailed design, a recommended implementation / phasing strategy and revised capital cost estimates;
- Interpretation Master Plan: a comprehensive plan, detailing interpretive goals and objectives, target audiences, interpretive themes and stories, personal and non-personal delivery programs, recommended media, evaluation and monitoring framework, implementation strategy, and revised capital cost estimates.

Estimated costs of the Site Development and Interpretation Master Plans are expected to vary according to the development level ultimately implemented. Costs of the other investigations / assessments should remain generally constant, regardless of the development level implemented.

4.4.4 Pre-development Site Work

The following pre-development site work is required, based on recommendations of GRB Project Management (1994) and on needs identified by this consulting team in its brief visit to the brick plant in August 1996:

Fire Protection Measures

Establish a fire guard around the perimeter of the property by tilling a 30 metre strip to remove vegetation which will insulate the site from adjacent grass and farm area. (This will likely become an annual program).	$3,000.00
Full site clean up of debris and clean up of dried grass including the water lagoon and the residence on the west side of the property.	5,000.00
Landscape with grass free material around wood structures.	4,000.00
Install a water line around the complex complete with fire hydrants located near the buildings. The existing lagoon would be used as a water source provided that it is kept full. A pumping station would have to be established in or near the existing filter station.	120,000.00

Site Security Measures

Fencing should be erected along the property line adjacent to the access road (500 metres).	$13,000.00
Construct a lockable gate in the fence along the clay pit road.	500.00
Construct a 1.2 m high safety fence around the lagoon.	10,000.00
Remove the dock at the west end of the lagoon.	250.00
Install a monitored security system that would detect unauthorized access to the site. A modest system is initially required with sensors near the main site access road and near the south kiln area. The monitoring system would assist the on-site custodian in recording public access.	5,000.00
Temporary site lights should be installed to provide security to the plant.	2,000.00

Provision / Renewal of Site Services

Natural Gas The natural gas line into the plant was never removed after the plant was shut down. The lines should be re-commissioned to provide gas for heating and for at least one kiln.	$3,000.00
Telephone A four pair telephone line should be installed to the site to provide security services, communications by telephone and provide a line of communication for contractors working at the site.	2,000.00

Site Drainage Measures

The natural drainage channels should be cleaned of debris or excessive weed growth and culverts checked for structural damage and replaced as necessary. Positive drainage should be provided to reduce moisture penetration to the building foundations.	$10,000.00
The area around the West transfer house should be regraded in order to minimize moisture penetration to the foundation.	15,000.00

Kiln Area Clean-up / Repair

Remove weeds from the outdoor area around the kilns (approx. 3200 m^2)	$1,600.00
Repair brick walking surface (assume 10% of the area requires repair)	16,000.00

Environmental Measures

Environmental concerns that must be addressed:

(a)	Large oil storage tank south of the engine room should be steam cleaned, sand blasted and painted.	$5,000.00
(b)	Two oil tanks located in the engine room should be emptied, steam cleaned and painted.	2,500.00
(c)	The oil tank located outside the west wall of the plant should be steam cleaned, sand blasted and painted.	1,000.00
(d)	The two tanks outside of the office building should be steam cleaned, sand blasted and painted.	1,500.00
(e)	Pipes insulated with asbestos insulation will have to be stripped and new environmentally appropriate insulation and cover applied.	20,000.00
(f)	The electrical transformers on the site contain P.C.B.'s and should be replaced.	12,500.00

Plant Equipment Inventory and Protection

The three diesel engines, cooling tower and generator sets should be steam cleaned of all contaminants, greased and new oil installed. The cooling systems should be flushed and neutralized and filled with a non corrosive protective anti-freeze solution.	$5,000.00
Lathes, drills, all power equipment, drive motors and systems should be cleaned and serviced to prevent deterioration.	2,000.00
Electrical supply / transfer panels should be cleaned and sealed to prevent further deterioration.	1,000.00
All tools should be listed, documented, cleaned and sealed to prevent deterioration. Future plans should consider measures to secure these artifacts.	3,000.00
All equipment, brick press, grinder, conveying machinery and ball mill should be cleaned re-greased and serviced to prevent deterioration.	8,000.00

Wooden moulds in carpentry shop should be inventoried / cleaned and stored in weather/rodent proof building.	$2,000.00
Laboratory equipment, small kiln, compression tester, sieves, etc. to be cleaned inventoried and stored in secure weather proof building.	2,000.00
Fan equipment and ductwork for natural gas fired kilns should be cleaned, serviced and exposed areas painted to protect from the weather.	2,000.00

4.4.5 Building Stabilization / Rehabilitation

The following cost estimates for building stabilization/rehabilitation are based on the consulting team's site reconnaissance and on review of previous assessments of the brick plant. Estimates are provided for all three optional levels of development, according to the development scenarios set out in Section 4.3 (above).

1. **Bunkhouse**

Level I:		
▸ Installation of a heating system capable of maintaining 35 - 40°F, to prevent further deterioration of the facility.	5,000.00[1]	
▸ General clean-up of interior ▸ Interior upgrading of lighting systems, exits, exit stairs and general upgrading; (sq.ft. estimate)	25,000.00	
Total Level I	30,000.00	30,000.00

Level II:		
▸ All elements of Level I	30,000.00	
▸ Additional upgrading of the interior, partial renovations ▸ New exit stair from Second Floor ▸ Partial restoration of elements (sq.ft. estimate)	105,000.00	
Total Level II	135,000.00	135,000.00
Level III:		
▸ All elements of Level I and II	135,000.00	
▸ Inclusion of kitchen facility and washrooms ▸ Inclusion of small video theatre ▸ Additional restoration of the interior (sq.ft. estimate)	165,000.00	
Total Level III	300,000.00	300,000.00
No costing has been included for roofing replacement or exterior masonry wall repairs and repointing, and window replacement and repairs.		

2. **Clay Storage/Crusher Area**

Level I:		
▸ Regrading of the site west of the Transfer Shed to improve drainage and provide a board walk entrance to the facility.	20,000.00[2]	
▸ Improvements to interior walkways. ▸ Partial repairs to exterior walls. ▸ Installation of emergency lighting. ▸ General clean-up of facility. (sq.ft. estimate)	11,000.00	
Total Level I	31,000.00	31,000.00

Level II:		
▸ All elements of Level I	31,000.00	
▸ Additional lighting systems ▸ Installation of safety devices on operating equipment. ▸ Additional clean-up and general repairs (sq.ft. estimate)	15,000.00	
Total Level II	46,000.00	46,000.00
No costing has been included for roof replacement, masonry repairs or window repairs or replacement.		

3. **Brick Press Area**

Level I:		
▸ Installation of a heating system to maintain a minimum of 35 - 40°F to prevent further deterioration of tunnels, dryers and equipment.	80,000.00[1]	
▸ Installation of emergency lighting. ▸ Improvement of walkway ▸ General upgrading and repair (sq.ft. estimate)	8,000.00	
Total Level I	88,000.00	88,000.00
Level II:		
▸ All elements of Level I	88,000.00	
▸ Additional lighting systems ▸ Additional upgrading and repair (sq.ft. estimate)	10,000.00	
Total Level II	98,000.00	98,000.00
No costing has been included for roof replacement, masonry or window repairs or replacement.		

4.	**Brick Transfer Area**		
	Level I:		
	▸ Repairs to roofing, partial replacement (sq.ft. estimate)	10,000.00	
	▸ Repairs to concrete floors ▸ Repairs to exterior walls ▸ Installation of emergency lighting ▸ General upgrading and repair (sq.ft. estimate)	10,000.00	
	Total Level I	20,000.00	20,000.00
	Level II:		
	▸ All elements of Level I	20,000.00	
	▸ Additional lighting systems ▸ Additional upgrading and repair (sq.ft. estimate)	5,000.00	
	Total Level II	25,000.00	25,000.00
5.	**Machine Shop**		
	Level I:		
	▸ Replacement of main electrical service	8,500.00[1]	
	▸ Installation of emergency lighting ▸ General upgrading and repair (sq.ft. estimate)	5,500.00	
	Total Level I	14,000.00	14,000.00
	Level II:		
	▸ All elements of Level I	14,000.00	
	▸ Additional lighting systems ▸ Additional upgrading and repairs (sq.ft. estimate)	12,000.00	
	Total Level II	26,000.00	26,000.00
	No costing has been included for roof replacement, masonry repairs or window repairs or replacement.		

6.	**Hand Moulding Area, Hot Floor, Drying Tunnels, West Transfer Shed**		
	Level I:		
	▸ Replacement of roofing over Hand Mould Area (sq.ft. estimate)	50,000.00	
	▸ Replacement of roofing over West Transfer Shed (sq.ft. estimate)	8,000.00	
	▸ Installation of emergency lighting		
	▸ General upgrading and repair (sq.ft. estimate)	10,000.00	
	Total Level I	68,000.00	68,000.00
	Level II:		
	▸ All elements of Level I	68,000.00	
	▸ Replacement of deteriorated concrete floors (sq.ft. estimate)	20,000.00	
	▸ Repairs to west wall of Shed (sq.ft. estimate)	6,000.00	
	▸ Improvement of lighting, repairs to catwalks, general upgrading (sq.ft. estimate)	18,000.00	
	▸ Stabilization of masonry wall (Allowance)	10,000.00	
	Total Level II	122,000.00	122,000.00
	No costing has been included for masonry repointing or window repairs/replacement		
7.	**Carpentry Shop**		
	Level I:		
	▸ Temporary stabilization of exterior wall.		
	▸ General upgrading and repair (sq.ft. estimate)	4,000.00	
	Total Level I	4,000.00	4,000.00

Level II:		
▸ Elements of Level I	4,000.00	
▸ Installation of improved lighting systems ▸ Upgrading and repairs to exterior walls and interior of the facility (sq.ft. estimate)	40,000.00	
Total Level II	44,000.00	44,000.00
No costing has been included for masonry repointing and repair or window repairs/replacement		
8. **Kilns**		
Level I:		
▸ Patching and repairs to dome roofs of 10 kilns	20,000.00[2]	
▸ Closure of subfloor flues ▸ Temporary supports ▸ General clean-up and repair (Allowance)	20,000.00	
Total Level I	40,000.00	40,000.00
Level II:		
▸ All elements of Level I	40,000.00	
▸ Additional roofing to three kilns ▸ Improved lighting systems ▸ Gas service to one kiln ▸ General upgrading and repair (Allowance)	60,000.00	
Total Level II	100,000.00	100,000.00

9. **Stock Sheds**

Level I:		
▸ Repairs and replacement of roofing		
▸ Installation of emergency lighting		
▸ General upgrading and repair		
(sq.ft. estimate)	45,000.00	
Total Level I	45,000.00	45,000.00
Level II:		
▸ All elements of Level I	45,000.00	
▸ Repairs to concrete floor		
▸ Improved lighting system		
▸ Repairs to exterior walls		
▸ General upgrading and repair		
(sq.ft. estimate)	50,000.00	
Total Level II	95,000.00	95,000.00

No costing has been included for masonry repairs or window repairs/replacement.

10. **Office**

Level I and II:		
▸ Additional repairs to the roof.		
▸ Stabilization of the exterior wall		
(sq.ft. estimate)	4,000.00	
Total Level I and II	4,000.00	4,000.00
Level III:		
▸ All elements of I and II	4,000.00	
▸ Replacement of deteriorated floor		
▸ Upgrading and repairs to interior walls, ceilings, floors and lighting.		
(sq.ft. estimate)	42,000.00	
Total Level III	46,000.00	46,000.00

No costing has been included for repairs to masonry walls or window repair/replacement

11.	**Boiler Room**		
	Level I and II:		
	▸ Installation of emergency lighting		
	▸ Repairs to exterior walls		
	▸ General upgrading and repair (sq.ft. estimate)	10,000.00	
	Total Level I and II	10,000.00	10,000.00
	Level III		
	▸ All elements of Level I and II	10,000.00	
	▸ Improved lighting systems		
	▸ Additional upgrading and repair (sq.ft. estimate)	8,000.00	
	Total Level III	18,000.00	18,000.00
	No costing has been included for roof repairs or window repair/replacement		
12.	**West Residence**		
	Level I and II:		
	▸ Replacement of roofing		
	▸ Securing and weatherproofing exterior of structure		
	▸ General clean-up (sq.ft. estimate)	5,000.00	
	Total Level I and II	5,000.00	5,000.00
	Level III:		
	▸ Elements of Level I and II	5,000.00	
	▸ Restoration of the interior and exterior of the residence (sq.ft. estimate)	48,000.00	
	Total Level III	53,000.00	53,000.00

Note [1]: Costing based on:

"Claybank Brick Plant Historical Site
Presentation and Public Safety
Capital Cost Estimate"
Prepared by GRB Project Management
for
Saskatchewan Heritage Foundation
November 7, 1994

Note [2]: Costing based on:

"Claybank Brick Plant National Historic Site
Action Plan for the Development of Conservation
Report, Final Draft
Real Property Services (CH/EC)
Public Works and Government Services Canada
Prairie and Northwest Territories Region
March, 1996

4.4.6 Site and Infrastructure Development

The following estimates reflect the work anticipated for site and infrastructure development to meet the requirements of each of three optional levels of development described in Section 4.3 (above).

LEVEL 1 DEVELOPMENT

Vault Toilets	$13,000.00
Water Cistern	4,000.00
Visitor Parking Lot	300.00
Entry Road	1,000.00
Gravel Pathways	1,000.00
Highway Signage	6,000.00

LEVEL 2 DEVELOPMENT

Vault Toilets	$13,000.00
Water Cistern	4,000.00
Visitor Parking	6,000.00
Entry Enhancement	1,500.00
Entry Road	350.00
Gravel Pathways	1,000.00
Trail to Clay Pits	18,000.00
Rest Areas / Stops	2,400.00
Highway Signage	8,600.00

LEVEL 3 DEVELOPMENT

Vault Toilets	$13,000.00
Potable Water System: A new main water line has been laid from Avonlea to Claybank to serve some of the outlying farms. This line can be tapped into and water brought onto the site. The flow rate is 1.5 gallons/minute and therefore a holding tank/pressure system should be installed.	30,000.00
Sewage Lagoon	50,000.00
Visitor Parking Lot	6,000.00
Entry Enhancement	5,000.00
Entry Road	625,000.00
Gravel Pathways	1,000.00
Trail to Clay Pits	22,200.00

Rest Areas / Stops	2,800.00
Highway Signage	16,800.00

4.4.7 Interpretive Development

The following cost estimate reflect anticipated needs for interpretive and related facilities for each of the three optional development levels.

LEVEL 1 DEVELOPMENT

Enhanced Accessibility	$2,000.00
Barriers for Public Safety: The established tour pathways should be upgraded by removing walkway hazards and installing ramps where needed.	1,500.00
Demonstration Equipment Safety Features (e.g. chain guards, belt guards, shaft covers, public access barriers, key-operated controls, isolated electrical circuits).	3,000.00
Interpretive Panels / Storyboards	20,000.00
Site / Directional Signage	2,500.00

LEVEL 2 DEVELOPMENT

Enhanced Accessibility	$3,000
Barriers for Public Safety: The established tour pathways should be upgraded by removing walkway hazards and installing ramps where needed.	2,000

Demonstration Equipment Safety Features (e.g. chain guards, belt guards, shaft covers, public access barriers, key-operated controls, isolated electrical circuits).	$15,000.00
Interpretive Panels / Storyboards	30,000.00
Site / Directional Signage	3,750.00
Interactive Displays	10,000.00

LEVEL 3 DEVELOPMENT

Enhanced Accessibility	$3,000.00
Barriers for Public Safety: The established tour pathways should be upgraded by removing walkway hazards and installing ramps where needed.	2,000.00
Demonstration Equipment Safety Features (e.g. chain guards, belt guards, shaft covers, public access barriers, key-operated controls, isolated electrical circuits).	19,000.00
Interpretive Panels / Storyboards	40,000.00
Site / Directional Signage	4,000.00
Interactive Displays	25,000.00

4.4.8 Summary of Estimated Capital Costs

Table 4-1 sets out, in summary form, estimated capital costs for all these optional development levels described in Section 4.3 (a more detailed itemization of these costs may be found in Appendix 1). Total capital costs (excluding those items previously specified) are as follows:

TABLE 4-1: SUMMARY OF ESTIMATED CAPITAL COSTS			
EXPENDITURE CATEGORY	**LEVEL 1**	**LEVEL 2**	**LEVEL 3**
Inventory, Assessment and Planning	$114,600	$132,800	$140,500
Pre-development Site Work	$360,400	$398,400	$398,400
Building Stabilization/Rehabilitation	$522,000	$1,027,000	$1,450,000
Site and Infrastructure Development	$35,450	$78,850	$1,105,000
Interpretive Development	$41,750	$91,750	$133,500
TOTAL	**$1,074,200**	**$1,728,800**	**$3,227,400**

4.5 OVERVIEW OF POTENTIAL FUNDING PROGRAMS

4.5.1 Available Capital Funding Programs

The following potential sources for capital and related funding requirements have been identified at this point:

a. New Careers Corporation

As noted in Section 4.4.2, New Careers Corporation has already carried out and/or committed to undertake work requiring $20,000 for materials (to date), approximately $60,000 per year for supervisory and travel costs and up to approximately $250,000 annually for five years for work crew wages and associated costs. The Saskatchewan Heritage Foundation is responsible for paying materials, travel and supervisory costs directly.

Further involvement of NCC, which provides job training for Saskatchewan residents, in the restoration and development of the components of the Claybank project will be a key element in any implementation strategy.

b. Senior Government Tourism Programs

At present, no capital funding programs are available through the Canadian Tourism Commission or through Tourism Saskatchewan. Future monitoring by the Saskatchewan Heritage Foundation, and other organizations involved in bringing the Claybank project forward, of future tourism capital funding programs could ensure that the Claybank project receives access to any future available funding programs.

c. Department of Canadian Heritage

The Department's National Cost-Sharing Program provides matching capital funding of facilities which have received National Historic Site designation and whose rehabilitation and restoration have unique / critical heritage significance for Canada. The eligibility of the Claybank Brick Plant project under the Program has already been confirmed by Canadian Heritage, including funding for rebuilding of the roof on the brick plant and for restoration of kilns and chimney stacks.

Comparable historical / heritage sites elsewhere in Canada have, in recent years, received approximately $50,000 to $60,000 per year for up to five years for such capital expenditures. Availability of matching funding from other sources is essential to successful access to the Program.

d. Other Potential Capital Funding Sources

As the organization responsible for the management and future development of the Claybank Brick Plant, the Saskatchewan Heritage Foundation could also serve directly as the fund-raising vehicle for private donations which could receive tax-deductible status. The Claybank Brick Plant Historical Society could serve as the recipient of donations from philanthropic foundations. Either the Foundation or the Society could serve as the organizing and receiving body for special fund-raising projects for the Plant's capital development program.

4.5.2 Operating Funding Assistance

a. Provincial Marketing Programs

The operators of the Claybank project should take every cost-effective opportunity to "piggyback" on or participate in provincial government tourism marketing programs. Also, the project's participation in joint marketing programs with other facilities and attractions can lead to obtaining other provincial tourism marketing financial assistance, as well as achieve economies of scale and benefits of synergy, in cost-shared and joint / cross marketing initiatives.

b. Canadian Tourism Commission

The Commission has established a "Products Club" program, encouraging the formation of affiliations of facility operators and other businesses around a tourism product cluster. Small and medium-sized businesses and attractions are eligible for, and encouraged to access, this program.

Besides initiatives to share marketing efforts and budgets (and receive Federal funding assistance to do so), Club members would also receive assistance in creating new tourism products and in packaging existing products into a commonly-promoted initiative.

Funding assistance under the program is available for up to three years and requires demonstrated access to matching funds from other sources.

c. Summer Student Employment Subsidies

Student employment would be an important component of the Claybank project's annual operating budget, no matter which development level option would be pursued (refer to Section 5.4). Future availability of government student summer employment wage subsidies will depend upon the health of the economy in future years. It is feasible to assume that the Claybank project could receive, on an annual basis, up to a fifty per cent subsidy on the base wages of up to four or five student employees. On an annual basis, for the Level 2 development option for example, this annual subsidy could reduce net expenditures of the project by as much as $20,000.

5. PRELIMINARY OPERATING ESTIMATES

5.1 FUNCTIONAL AND ASSOCIATED PROGRAMS

This section reflects a transition between the definition of development level options in Section 4.3 and the operating revenue and expenditure estimates for each option, which are set out in Section 5.4, below.

5.1.1 Level 1 Development

The following core programs would be anticipated for a Level 1 project development, on the basis of an operating season from 15 June through Labour Day, and including some special visits:

1. **Touring by visitors:**

   - brief orientation / reception (15 minutes)
   - mainly self-guided tours, especially on weekdays
   - limited number of pre-scheduled, guided tours for groups, including bus tours (especially on weekdays)
   - scheduled program of guided tours on weekends, mainly using volunteers
   - 15 to 25 June: school tours (maximum of about two per day)

2. **Activity demonstrations and other visitor programs:**

   - school tours: packaged 1.5 to two-hour visit, plus classroom education kit (pre-visit)
   - Walkman rentals for self-guided tours
   - limited number of demonstrations, mainly on weekends (and mainly by volunteers)
   - modest gift / souvenir shop
   - trail rides (independent business)

3. **Food services / accommodations:**

- small concession area
- bed and breakfast: small number of rooms; perhaps limited meal service (run as independent business)

4. **Other amenities:**

- small number of picnic tables
- perhaps a children's play area
- non-modern (vault) toilets

5.1.2 Level 2 Development

Project development at this level assumes an operating season from 01 June through Labour Day:

1. **Touring by visitors:**

- longer orientation / reception (at least 30 minutes)
- increased number of touring options (including more to do and see)
- school tours of two to three hours (01 to 25 June, up to three or four per day)
- Walkman / self-guided tours include the option of taking a walking trail (perhaps to the clay pits)
- guided tours available each day from 15 June through Labour Day (at least five or six per day)
- bus tour groups would have access to a larger number of guided tours, and greater length of stay
- volunteer help on weekends would still be important

2. **Activity demonstrations and other visitor programs:**

- longer school group visits, plus classroom material (pre-visit)
- self-guided / Walkman tours would involve longer circuits (including the clay pits)
- at least two each of video and physical demonstrations on-site (each day)
- trail rides
- better souvenir / gift shop

3. **Food services / accommodations:**

- more meal service possible at the bed and breakfast
- better concessions area (limited hot menu - microwave)

4. **Other amenities:**

- playground area for children
- bigger picnic area
- non-modern (vault) toilets

5.1.3 Level 3 Development

This development option assumes an operating season from 01 June through at least Labour Day:

1. **Touring by visitors:**

- longer orientation / reception (45 to 60 minutes)
- option of Walkman self-guided tours
- longer and more frequent daily guided tours

- continued use of volunteers on weekends
- more land longer school group tours (four or five per day)
- special program for bus tour groups (two to three hours, including meal)

2. **Activity demonstrations and other visitor programs:**

- school tours: at least two hours plus meal (plus pre-visit classroom material)
- Walkman rentals
- at least three each of videos and demonstrations (per day)
- trail rides
- high quality gift / souvenir shop
- perhaps wagon ride to clay pits

3. **Food services / accommodations:**

- bigger concession area
- possibility of small restaurant in bed and breakfast (packaged for school and bus tours)
- possible expansion of bed and breakfast operation to include others in the area (especially for bus groups)

4. **Other amenities:**

- picnic / playground area
- both non-modern (vault) toilets and modern washroom facilities

5.2 ATTENDANCE / REVENUE PROJECTIONS

Information presented in Sections 2.3 through 2.5 provides a preliminary indication of general locational and other factors which may affect attendance potential of the Claybank Brick Plant. The extent to which these and other factors may affect attendance will, of course, depend on the level of facility development and associated programming at the site.

Among the positive factors with respect to potential attendance at the brick plant site are the following:

1. Its relative proximity to the Trans-Canada Highway (Highway #1), a major tourism corridor for both Canadians and visitors to Canada.

2. Its location within one hour's drive from both Moose Jaw and Regina.

3. Potential attraction of bus tour groups visiting either the Temple Gardens Spa Resort in Moose Jaw or Casino Regina, as well as other attractions in the two cities.

4. The demonstrated uniqueness of the Claybank Brick Plant as an interpretive site.

5. Potential interest for such niche markets as school groups, seniors and other bus tourists, and persons and groups with a special interest in history and heritage touring.

Among the potentially negative factors which should be taken into account are the following:

1. The plant is not on the Trans-Canada Highway and a visit to the plant therefore requires a conscious decision to leave Highway #1.

2. Level 1 or 2 development options would not likely attract a large number of tourists to leave Highway #1.

3. Claybank is located in a large and diffuse tourism region; the region offers limited packaging and marketing opportunities compared to those for attractions in, for example, high-intensity tourism regions or large urban areas.

4. The base provincial urban population is relatively limited.

5. Industrial heritage attractions are not of strong interest to all tourists.

6. Recent data indicate that attendance at historic / heritage attractions in Manitoba, Saskatchewan and Alberta have been static or declining in the past few years; weather and promotion / programming budget cuts may explain this trend.

7. The Claybank Brick Plant project will operate during a relatively short season, in an environment of tight government and industry spending on marketing and promotion, and susceptibility to bad weather, higher gasoline prices and currency exchange rate fluctuations.

Based on the actual experience of comparable attractions, it is conceivable that the impact upon attendance at the Claybank Brick Plant of the project progressing from development at Level 1 to Level 3 would be to increase attendance as follows:

- **For Level 1**: 6,000 visitors in year 1, growing to 8,000 visitors in year 5;
- **For Level 2**: 8,000 visitors in year 1, growing to 10,000 visitors in year 5; and
- **For Level 3**: up to 10,000 visitors in year 1, growing to up to 12,000 visitors in year 5.

The composition and behaviour of the attendance base would also differ among the three development level scenarios:

- The number and percentage of school group visitors and out-of-province-origin visitors would increase at Levels 2 and 3, relative to Level 1.
- Higher development levels would also correspond to higher spending per visitor: higher admission prices paid; higher spending on food, souvenirs and other activities; and increased spending resulting purely from increased length of average visit.

The following attendance projections are submitted for the three development level options:

Level 1

Assuming average summer weather and favourable economic conditions, the Claybank Brick Plant could attract 6,000 visitors in year one, increasing to 8,000 visitors in year 5 of Level 1 development. An annual marketing budget of at least $30,000 would be

required (including amounts received through marketing grants and project "piggybacking" on other marketing programs).

The breakdown of Level 1 attendance is projected as follows:

- 20 to 25% non-Saskatchewan-origin visitors (the importance of the Temple Gardens Spa and Casino Regina is evident);
- 800 to 1,000 school-group visitors (that is, up to 10% of all visitors); and
- important sub-markets would be: nearby urban residents (importance of visiting friends and relatives - VFR - market); seniors' groups; and packaging with other regional attractions and with history / heritage interest groups.

Level 2

Attendance projections for development at Level 2 are for 8,000 visitors in year 1, increasing to 10,000 visitors in year 5. Level 2 marketing would require a total budget of at least $40,000 (including grants and "piggybacking").

Important sub-markets would be:

- at least 25% of visitors would be non-Saskatchewan-origin visitors (importance of the Spa and Casino, and of marketing on the Highway #1 corridor to the west and east of Claybank);
- school-group visitors: 1,500 to 2,000 visitors;
- a continued emphasis on Saskatchewan-origin markets: urban, VFR tourists, special interest groups (especially history and heritage); and
- increased linkage with other historic / heritage attractions along the Highway #1 corridor.

Level 3

Projected attendance of Level 3 development would be 9,000 visitors in year 1, increasing to 12,000 in year 5. Marketing spending for this development level should be in the order of $50,000, including grants and "piggybacking".

Key sub-markets are projected to be as follows:

- out-of-province-origin visitors: up to 33% (importance of Spa, Casino, Highway #1 and strong joint and cross-marketing with other history / heritage attractions from Medicine Hat to Winnipeg);
- school-tour groups: 2,000 to 2,500 visitors
- similar importance and composition of Saskatchewan-based markets to Level 2; and
- continued emphasis on links with other attractions and with regional marketing initiatives.

5.2.1 Revenue-Related Assumptions

Revenue-related assumptions upon which the detailed project financial forecasts have been derived (refer to Section 5.4) are as follows:

1. Weighted average admission prices:

Level 1:	$5 / person
Level 2:	$6 / person
Level 3:	$8 / person

2. Other visitor spending (food, gifts, Walkman rentals, and excluding spending on independent commercial operations at the site):

Level 1:	$4 net profit per person
Level 2:	$6 net profit per person
Level 3:	$9 net profit per person

3. "Royalty" revenue from independent commercial operations, such as trail rides, wagon rides and bed and breakfasts (formula based on a percentage of net revenues):

Level 1:	$5,000
Level 2:	$7,000
Level 3:	$10,000

4. Revenues from special events, special tours and rentals for meetings and other gatherings:

Level 1:	$5,000 in year 1
Level 2:	$7,000 in year 1
Level 3:	$10,000 in year 1

5. Marketing revenues to be applied to project marketing budget (value of grants and "piggyback" projects):

Level 1:	$15,000 in year 3
Level 2:	$20,000 in year 3
Level 3:	$30,000 in year 3

5.3 STAFFING AND OTHER OPERATING BUDGETS

The following expenditure forecasts assume:

- that fairly stable cost levels can be maintained, despite the increases forecast in the number of visitors from year 1 to year 5;
- minimal revenue or cost impacts of the independent commercial operations on-site;
- no major outside assistance from municipal / provincial government or other sources to pay for maintenance and repairs other than, perhaps, provision of services at cost; and
- potential for high overlap of marketing efforts between the project's budget and programs / budgets elsewhere.

The following cost-related assumptions have been used:

Level 1

1. Basic staff costs:

Manager: salary of $3,000 / month
Students: wages of $6.00 / hour (approximately 3,450 hours per year)
Loading of benefits and expenses: add 25%

2. Operations and maintenance (O&M) / custodial: based on actual experience of comparable facilities and consulting team's research: $20,000 / year, plus 25% for benefits and expenses

3. Office, utilities and basic services (telephone, etc.): $20,000 / year

4. Volunteers: $1,500 per year (mileage; golf shirts / caps; wrap-up party)

5. Marketing budget (net of grants and "piggybacking"): $15,000 / year

6. Supplies and materials (including Walkmans): $5,000 / year

Level 2

1. Basic salary costs: as per Level 1 (per hour, day and month)

2. O&M / custodial: $25,000 / year, plus 25%

3. Office, utilities, services: $20,000 / year

4. Volunteers: $2,000 / year

5. Net marketing budget: $20,000 / year

6. Supplies and materials (including Walkmans): $6,000 / year

Level 3

1. Basic salary costs: as per Levels 1 and 2 (per hour, day and month)

2. O&M / custodial: $35,000 / year, plus 25%

3. Office, utilities and services: $30,000 / year

4. Volunteers: as per Level 2

5. Net marketing budget: increasing from $40,000 in year 1 to $50,000 in year 5

6. Supplies and materials (including Walkmans): $8,000 / year

It is noted that the expenditure item which varies the most among the three development level options is projected spending for student employees during the project's summer operating season. Project access to future available student summer employment subsidy programs could reduce considerably the net cost to the project of the required student employees. Accordingly, the operating results shown in Section 5.4 could be modified considerably.

5.4 PRO FORMA OPERATING STATEMENTS

Tables 5-1, 5-2 and 5-3 set out the projected revenues and expenditures over the first five years of operation of the Claybank Brick Plant project, based on the defined three development level options. It is noted that:

1. Project access to future summer student employment programs could reduce the project's annual payroll costs considerably and would thus modify the following projections.

2. Seasonal business operations susceptible to revenue fluctuations because of weather conditions and other uncontrollable factors should have access to working capital equal to at least 25% of projected revenues for any operating period.

3. The statements do not include depreciation expenses for project facilities, equipment and other depreciable assets; varying rates will apply for different types of assets.

4. The following statements assume that average summer weather conditions, stable gasoline prices and stable / favourable currency exchange rates apply.

TABLE 5-1: PROJECTED OPERATING REVENUES AND EXPENSES DEVELOPMENT LEVEL 1			
	Year 1	**Year 3**	**Year 5**
Revenues			
Admissions	$30,000	$35,000	$40,000
Other Visitor Spending (net profit)	$24,000	$28,000	$32,000
Royalties from Commercial Operations	$4,000	$5,000	$5,000
Special Events, Tours, etc.	$4,000	$5,000	$5,000
Marketing Grants and "Piggybacking"	$12,000	$15,000	$15,000
Total Revenues	**$74,000**	**$88,000**	**$97,000**
Expenditures			
Manager's Salary	$19,000	$19,000	$19,000
Students' Salaries	$26,000	$26,000	$26,000
O&M / Custodial	$25,000	$25,000	$25,000
Office, Utilities, Services	$20,000	$20,000	$20,000
Volunteers	$1,500	$1,500	$1,500
Total Marketing Budget	$27,000	$30,000	$30,000
Supplies	$5,000	$5,000	$5,000
Total Expenditures	**$123,500**	**$126,500**	**$126,500**
Operating Surplus (Deficit)	**($49,500)**	**($38,500)**	**($29,500)**

TABLE 5-2: PROJECTED OPERATING REVENUES AND EXPENSES DEVELOPMENT LEVEL 2			
	Year 1	**Year 3**	**Year 5**
Revenues			
Admissions	$48,000	$54,000	$60,000
Other Visitor Spending (net profit)	$48,000	$54,000	$60,000
Royalties from Commercial Operations	$6,000	$7,000	$7,000
Special Events, Tours, etc.	$6,000	$7,000	$7,000
Marketing Grants and "Piggybacking"	$18,000	$20,000	$20,000
Total Revenues	**$126,000**	**$142,000**	**$154,000**
Expenditures			
Manager's Salary	$38,000	$38,000	$38,000
Students' Salaries	$65,000	$65,000	$65,000
O&M / Custodial	$31,000	$31,000	$31,000
Office, Utilities, Services	$20,000	$20,000	$20,000
Volunteers	$2,000	$2,000	$2,000
Total Marketing Budget	$38,000	$40,000	$40,000
Supplies	$6,000	$6,000	$6,000
Total Expenditures	**$200,000**	**$202,000**	**$202,000**
Operating Surplus (Deficit)	**($74,000)**	**($60,000)**	**($48,000)**

TABLE 5-3: PROJECTED OPERATING REVENUES AND EXPENSES DEVELOPMENT LEVEL 3			
	Year 1	**Year 3**	**Year 5**
Revenues			
Admissions	$72,000	$88,000	$96,000
Other Visitor Spending (net profit)	$81,000	$99,000	$108,000
Royalties from Commercial Operations	$9,000	$10,000	$10,000
Special Events, Tours, etc.	$9,000	$10,000	$10,000
Marketing Grants and "Piggybacking"	$25,000	$30,000	$30,000
Total Revenues	**$196,000**	**$237,000**	**$254,000**
Expenditures			
Manager's Salary	$45,000	$45,000	$45,000
Students' Salaries	$130,000	$130,000	$130,000
O&M / Custodial	$44,000	$44,000	$44,000
Office, Utilities, Services	$25,000	$30,000	$30,000
Volunteers	$2,000	$2,000	$2,000
Total Marketing Budget	$45,000	$55,000	$60,000
Supplies	$8,000	$8,000	$8,000
Total Expenditures	**$299,000**	**$314,000**	**$319,000**
Operating Surplus (Deficit)	**($103,000)**	**($77,000)**	**($65,000)**

5.5 IMPACT OF REDUCED ATTENDANCE

Tourism businesses and attractions are susceptible to potentially serious fluctuations in attendance in relation to even the most cautious projections, because of such factors as poor weather, increases in gasoline prices, changes in currency exchange rates and other economic / political factors.

Tables 5-4 and 5-5 set out the projected impacts for all three development options of, respectively, attendance at 60% and 80% of levels projected in Section 5.2; such fluctuations occur on a regular basis for seasonal tourism attractions and justify a working capital base capable of sustaining operations during even temporary revenue decreases beyond the control of the operator of the attraction.

It is noted that while revenues can drop dramatically without much warning, it is often difficult to reduce expenditures accordingly. Often, in fact, only modest reductions in staffing can be effected toward the end of the attraction's operating season, because of the unpredictability of short term conditions affecting attendance; also, the operator of the attraction wishes to maintain a core level of programming and services at all times, even if attendance has suddenly fallen.

As demonstrated in Tables 5-4 and 5-5, whichever scenario might occur, the overall impact for each development level option is a significant change in the facility's operating results.

TABLE 5-4: FINANCIAL IMPACT OF ATTENDANCE AT 60% OF PROJECTIONS			
	Year 1	**Year 3**	**Year 5**
Level 1			
Revenues	$49,000	$59,000	$64,000
Expenditures	$112,000	$115,000	$115,000
Operating Surplus (Deficit)	**($63,000)**	**($56,000)**	**($51,000)**
Level 2			
Revenues	$81,000	$91,000	$99,000
Expenditures	$178,000	$180,000	$180,000
Operating Surplus (Deficit)	**($97,000)**	**($89,000)**	**($81,000)**
Level 3			
Revenues	$125,000	$152,000	$163,000
Expenditures	$263,000	$278,000	$283,000
Operating Surplus (Deficit)	**($138,000)**	**($126,000)**	**($120,000)**

TABLE 5-5: FINANCIAL IMPACT OF ATTENDANCE AT 80% OF PROJECTIONS			
	Year 1	**Year 3**	**Year 5**
Level 1			
Revenues	$60,000	$72,000	$79,000
Expenditures	$112,000	$115,000	$115,000
Operating Surplus (Deficit)	**($52,000)**	**($43,000)**	**($36,000)**
Level 2			
Revenues	$102,000	$116,000	$126,000
Expenditures	$178,000	$180,000	$180,000
Operating Surplus (Deficit)	**($76,000)**	**($64,000)**	**($54,000)**
Level 3			
Revenues	$161,000	$194,000	$208,000
Expenditures	$271,000	$278,000	$283,000
Operating Surplus (Deficit)	**($110,000)**	**($84,000)**	**($75,000)**

5.6 A "HYBRID" DEVELOPMENT SCENARIO

Based on the information presented in Tables 5-1 through 5-5, there is no strong indication of project feasibility at any of the three optional development levels and, based solely on project tourism revenues and expenditures, the consulting team cannot therefore recommend proceeding with any of the three development options. At the same time, the figures presented are not so negative (for at least some of the development levels) that a clear and simple case can be made for not proceeding with some form of tourism development at the Claybank Brick Plant, especially when such factors as heritage values are incorporated into the decision-making process.

Further, the consulting team, in analysing the three development and operational scenarios, noted that a fourth option might produce less negative results from a financial

perspective. The following discussion sets out the form of this fourth option, which we have named "Development Level 1.5".

5.6.1 Estimated Capital Costs and Funding

Estimated capital costs for Level 1.5 development are as follows (refer to Appendix 1, for a basis for costing):

1. Investigations, assessment and planning: as per Level 2

   $132,800.00

2. Pre-development site work: as per Level 2

   $398,400.00

3. Building stabilization / rehabilitation: as per Level 1, except:
   - bunk house: $100,000.00
   - brick press area: as per Level 2
   - brick transfer area: as per Level 2

   $637,000.00

4. Site and infrastructure development: as per Level 2, except:
   - entry enhancement: as per Level 1

   $77,000.00

5. Interpretive development: as per Level 2, except:
   - interactive displays: $5,000

   $84,500.00

TOTAL **$1,329,700.00**

Based on the above costs, the following discussion examines how development costs could relate to available capital funding and related assistance programs.

The following work is such that it could not likely be undertaken by NCC:

- all investigations, assessment and planning
- interpretive panels / storyboards, site / directional signage and interactive displays

The total estimated value of this work is $188,500.00. Work that could be undertaken by NCC would thus be valued at approximately $1,141,200.00. Assuming that 25% of this value is for materials, total materials cost would be $285,300.00. This leaves $855,900.00 of the budget that would be dedicated to labour and supervision. Based on an annual allocation of $60,000.00 to supervision and travel and $250,000.00 to crew labour, this total would represent approximately 2.7 years of NCC crew work on the project. On that basis, costs to the Foundation would be $447,300.00 ($162,000.00 for 2.7 years of supervision and travel costs and $285,300.00 for materials).

Assuming that the project is eligible for assistance from the Department of Canadian Heritage in the amount of $250,000, net project capital costs are reduced to $197,300.00.

Although not included in development cost estimates for Levels 1, 2 and 3 (as the information only recently became available), it is now possible to provide an indication of the expected costs for required masonry repairs. It has been estimated that a NCC crew of 5, with 2 masons as supervisors, would need up to four years to complete the required work. Based on $37,500 per year for supervisors' salaries and travel costs, total costs to the Foundation for this work would be $150,000 (assuming no materials costs); benefits to the foundation would include approximately $250,000 for crew labour payed by NCC. Total unfunded capital requirements for the project are thus estimated at $347,300.00 for Level 1.5 development.

5.6.2 Estimated Operating Revenues and Expenditures

Table 5-6 presents *pro forma* operating revenues and expenditures for the project based on Level 1.5 development. The following assumptions form the basis for these projections:

1. Revenues achieved will be 90% of total revenues estimated for Level 2 development.

2. Student salaries and O&M / Custodial expenditures will be at 80% of those estimated for Level 2 development.

3. All other expenditures will be at the levels projected for Level 2 development.

TABLE 5-6: PROJECTED OPERATING REVENUES AND EXPENSES DEVELOPMENT LEVEL 1.5			
	Year 1	**Year 3**	**Year 5**
Total Revenues	**$113,400**	**$128,000**	**$139,000**
Expenditures			
Manager's Salary	$38,000	$38,000	$38,000
Students' Salaries	$52,000	$52,000	$52,000
O&M / Custodial	$25,000	$25,000	$25,000
Office, Utilities, Services	$20,000	$20,000	$20,000
Volunteers	$2,000	$2,000	$2,000
Total Marketing Budget	$38,000	$40,000	$40,000
Supplies	$6,000	$6,000	$6,000
Total Expenditures	**$181,000**	**$183,000**	**$183,000**
Operating Surplus (Deficit)	**($67,600)**	**($55,000)**	**($44,000)**

As shown on Table 5-6, projected operating deficits for Level 1.5 are $7,000.00 to $10,000 less than those projected for Level 2. If the marketing program is able to generate revenues at 100% of those projected for Level 2, deficits would be reduced further, as follows:

Year 1: $55,000.00
Year 3: $41,000.00
Year 5: $29,000.00

It should also be noted that, with up to $20,000.00 per year in student employment subsidies, the project could come relatively close to a break-even situation from Year 5 on.

As shown in Section 2.5 of this report, World Heritage Site designation probably has a positive impact on attractions of a cultural, natural or industrial heritage character. While it is not possible to define with certainty even a range of attendance and revenue impacts

of such designation, the consulting team submits with confidence that should the Claybank Brick Plant project receive World Heritage Site designation prior to or concurrent with implementation of the recommended development program set out in this report, the project would easily achieve annual attendance levels and resulting revenues at least 25 to 50 per cent greater than those shown in Table 5-6.

Further, assuming that costs directly associated with applying for World Heritage Site designation are not borne by the project through their capitalization and deferral to future project operating revenues, the consulting team does not anticipate that project operating expenditures would need to be increased as a result of designation.

Consequently, it is recommended that the Saskatchewan Heritage Foundation incorporate potential operating revenue and surplus projections for Level 1.5 development, should the Claybank Brick Plant obtain World Heritage Site designation, as illustrated in Table 5-7.

The presence of Saskatchewan's first World Heritage Site in proximity to Regina and Moose Jaw, and within the Great Trails Getaway tourism region, would have a significantly positive impact on the area's tourism industry. Visitors to the two cities could be expected to visit the Claybank area and the region in greater numbers and more pass-through travellers on the Trans-Canada Highway could be expected either to prolong a short stay in southern Saskatchewan or to plan for a multi-day stop. Resulting tourism spending spinoffs would benefit both cities and the northern portion of the Great Trails Getaway region.

TABLE 5-7: PROJECTED OPERATING REVENUES AND EXPENSES DEVELOPMENT LEVEL 1.5 (ASSUMING WORLD HERITAGE SITE DESIGNATION)

	Year 1	Year 3	Year 5
Total Revenues	$141,300 - $169,500	$160,000 - $192,000	$173,800 - $208,500
Operating Surplus (Deficit)	($39,700) - ($11,500)	($23,000) - $9,000	($9,200) - $25,500

5.7 RECOMMENDATIONS

On the basis of the analysis presented to this point, the consulting team recommends the following:

1. If such non-monetary factors as educational benefits and the societal benefits of protecting and preserving a significant piece of Saskatchewan's industrial heritage, and financial factors such as the likely modest local and area secondary and spin-off benefits and modest long term employment creation opportunities, are to be considered in deciding the future of the Claybank Brick Plant project, the Foundation should consider that the operation of a tourism attraction at the site could be operated with modest levels of ongoing subsidization. It should be noted that the operation of subsidized attractions or components of attractions (even in the private sector) is common throughout North America, because of the other benefits realized by such operation. Should designation be obtained for the project as a World Heritage Site, financial projections suggest that long term subsidies would not be required.

2. If a decision is taken to pursue possible development of a tourism attraction at the Claybank Brick Plant, such development should be based on the Level 1.5 scenario set out in Section 5.6 of this report. Further, all items identified for capital development should be carefully considered to determine whether there may be ways to reduce or eliminate the costs associated with some items.

6. BUSINESS PLAN

6.1 POTENTIAL LINKAGES WITH OTHER ATTRACTIONS

The inventory and analysis of the tourism base within a 90-kilometre radius of the Claybank Brick Plant (discussed in Section 3.2) shows that the area in question enjoys the following strengths and weaknesses of particular relevance to the Claybank project:

Strengths

- an abundance of modern motel and hotel rooms in Regina and Moose Jaw, the supply of good-quality rooms within a relatively short drive to Claybank provides accommodation for bus-tour and other special-interest groups which could include a visit to Claybank in their itinerary, and a pool of potential visitors (many passing through the area on the Trans-Canada Highway) who might extend their stay in order to visit Claybank

- a good supply of serviced campsites within and near urban areas, in provincial and regional parks and in proximity to golfing and nature touring opportunities

- a small number of tour loops (two or three of a half-day or full-day duration) including around Claybank, such as those identified in general in Section 3.2

- high-quality family recreation links within an hour's drive of Claybank, such as Buffalo Pound Provincial Park and Dunnet Regional Park

- potential marketing links to several important urban-based attractions, to be discussed in more detail below.

Weaknesses

- a serious shortage of modern fixed-roof accommodations in the immediate vicinity of Claybank (the development of at least a small number of additional bed and breakfast and vacation farm operations around Claybank will be very important in this regard)

- the dispersed nature of other complementary attractions relative to Claybank's location; while the Great Trails Getaway tourism region has begun to develop a program of tour packages and has already obtained impressive results (as will be discussed below), the Claybank project will depend strongly on links with attractions in Regina and Moose Jaw.

Three urban-based attractions have special potential as thematic and/or marketing links to the Claybank Brick Project:

- the Temple Gardens Mineral Spa in Moose Jaw opened in 1996 and offers guests a four-storey hotel with spa, pool and convention / meeting facilities; it already works with the Western Development Museum in Moose Jaw through an attractions pass program; it also intends to develop a marketing and packaging relationship with Casino Regina; the marketing manager of the Spa indicated a strong interest in working with the Claybank Brick Plant project with respect to developing area tour loops for its guests and with the concept of a Heritage West group of attractions; the Spa will soon have its own site on the Internet and will establish links with other sites in southern Saskatchewan and elsewhere, as appropriate

- the Saskatchewan Science Centre in Regina attracts as many as 250,000 visitors annually; it has already established a high-quality web site, with which such attractions as the Claybank Brick Plant project could become linked; several of its exhibits are financed by, and interpret, major industries in the province; the presence of a display and other interpretive material on brick making and the Claybank Brick Plant project would be a valuable marketing vehicle for the project; the Centre's strong school visit program, which attracts more than 40,000 visitors annually, could also incorporate some information on the Claybank project

- the Royal Saskatchewan Museum in Regina has already developed promotional relationships with other attractions in Regina, including those located in Wascana Centre such as the Science Centre; a committee of Museum staff and employees of its provincial department has been formed to develop Internet-based information and promotional content on the Museum and its programs; the Museum attracts as many as 150,000 visitors per year, including at least 50% from within Saskatchewan; the presence of an information display on the Claybank Brick Plant at the Museum would be another useful marketing vehicle for the project and links between a Claybank Brick Plant web site and future Internet material on the Museum should be encouraged.

Several other attractions in the above-defined radius area around Claybank also offer potentially valuable marketing linkages with the Claybank Brick Plant project. They include local and area-themed museums, provincial and regional parks and special-interest touring programs, as set out in Section 3.2 of this report. The recommended marketing plan for the Claybank project will include specific actions to develop mutually beneficial links with such area attractions.

Of particular note in this regard is the recent (29 May 1997) opening / dedication of the Chaplin / Old Wives / Reed Lakes Area as a Western Hemisphere Shorebird Reserve Network Site. This accredited Wildlife Viewing Location in Saskatchewan, covers more than 42,000 ha and includes the second largest saline inland water body in Canada. More than 30 species of shorebirds, some endangered, stop or nest here each summer. This ecotourism attraction is expected to attract visitors who also, typically, have a tendency to visit heritage-themed attractions.

Other ecotourism or heritage attractions within an approximately 90-kilometre radius of Claybank are relatively few in number but would include the following:

- Nicolle Flats at Buffalo Pound Provincial Park; and
- St. Victor 's Petroglyphs Provincial Historic Park, southeast of Assiniboia.

Somewhat more distant but also of potential value in terms of possible marketing linkages are:

- the Big Muddy Badlands (currently marketed in a minor way out of Coronach);
- Wood Mountain Provincial Historic Park; and
- Gravelbourg, with its strong French cultural heritage and a number of historic buildings of considerable architectural significance and built with Claybank brick.

The Claybank Brick Plant project will also have the opportunity to participate actively in a successful and aggressive program of tour packages developed by the Great Trails Getaway tourism region. Sales of packages are aimed at specific markets, such as bus tour and Rv touring groups, through provision of full packages and attendance at industry trade shows.

The Claybank Brick Plant project, as a packaging group partner, would form part of tour packages originating out of Moose Jaw, with special potential emphasis on historical and cultural-themed day trips out of that city. Packages aimed at overseas-origin visitors, agricultural tourism visitors, and seniors travelling in groups or as couples, would include the Claybank Brick Plant.

On a wider basis, modest cross-marketing and joint promotion opportunities with attractions across southern Saskatchewan, and including some in Saskatoon, will also be addressed in the marketing plan. Two specific initiatives will be included in the recommended plan: Internet-based promotion and the development of a Heritage West network of attractions.

6.2 OPERATING PLAN

Based on the consulting team's review of other comparable attractions, and their experience gained during the conduct of similar consulting assignments, it is recommended that should the development program for the Claybank Brick Plant project proceed as recommended, the project should be placed under the management of a self-standing, not-for-profit corporation. It would probably be desirable that the new management structure for the project be in place several months prior to completion of the development program, in order to ensure an effective transition from the development phase of the project to full operation once development is completed.

The corporation would have a Board of Directors appointed by the Saskatchewan Heritage Foundation. It is recommended that the Board include representatives of the area around Claybank, the Foundation, business (including at least two persons with contacts and knowledge relevant to fund raising and marketing) and any other organizations or groups with a special interest in industrial heritage. Business and industrial heritage representatives could include one or two persons from outside Saskatchewan. A Board of seven members, including a small executive, would be able to function effectively and provide for the type of representation recommended.

The project's Manager would report to the Board and all staff would report to the Manager. Volunteers involved in working at the project during its operation and in fund raising and promotional activities would also report to the Manager. In order to maintain the strong level of local / area volunteer involvement already enjoyed by the Claybank Brick Plant, it is recommended that the Board also establish an auxiliary organization (perhaps The Friends of the Claybank Brick Plant).

This organization would assist the Board and Manager in the recruitment, recognition and motivation of volunteers involved with the project. Besides providing a pool of volunteers to work at the site as interest allows, the organization could be involved in carrying out specific fund raising projects and establishing links with groups and individuals who could provide a source of future visitors to the project.

The volunteer organization could also play a valuable role in the development and promotion of the school-visit program, including the development of pre-visit classroom materials and specific components of the on-site program, such as oral history segments to be used at specific portions of the visit to the site or during orientation upon arrival.

The project's operating season would be from June 1 to June 25, for conducting school tours , and from mid-June through Labour Day for visits by the general public. It is reasonable to plan for hours of operation from 10:00 a.m. to 6:00 p.m. Monday through Saturday and from 1:00 p.m. to 6:00 p.m. on Sundays during the public operating season.

Given the modest staffing foreseen for the project, as set out in Sections 4.3 and 5.6.2, the availability and involvement of enthusiastic volunteers will be very important, such as for special fund raising and promotion activities, conducting weekend tours and providing staffing backup for school visits and special tours during the season.

Significant opportunities for contracting-out of on-site activities include management of the gift shop / concession, development and operation of trail ride and bed and breakfast operations on-site and near the project, accounting / payroll functions and site maintenance. Significant involvement in local / area businesses in such activities could be foreseen.

In order to ensure a high-quality visitor experience within the constraints of staff and other budgets, it is recommended that site tours incorporate Walkman-assisted interpretation, including the use of oral history materials. Alternatively (or in association), should capital budgets permit, the use of sound post systems could achieve comparable effect. In addition, the initial orientation program for arriving visitors will be important in providing the historical context of the Plant. Use of displays including storyboards, photos, exhibits and perhaps a short video would provide adequate material for at least a fifteen-minute orientation.

Because a high proportion of visitors will be children (both during school touring periods and during the summer tourism season), it will be important to ensure that orientation and site visit materials are understandable and interesting to them. Pre-visit information on the Plant aimed at children could be included as part of the project's web site content.

6.3 MARKETING PLAN

The five-year marketing plan recommended for the Claybank Brick Plant project is based upon successful programs developed by and for other comparable attractions and the specific character and situation of the Brick Plant project. The consulting team submits that the key markets for the Claybank Brick Plant project are:

- multi-day visitors to Regina and Moose Jaw (between June 1 and September 30, Regina attracts more than 37,000 overnight visitors), including general tourists and convention and otherwise motivated visitors during the June to September period
- pass-through Trans-Canada highway traffic during the peak tourism season
- special-interest heritage groups based in or visiting western Canada and Saskatchewan
- Saskatchewan's urban resident population, especially in Regina and Moose Jaw (the key link to the important visiting friends and relatives - VFR - tourism market)
- school groups (specific grades would be related to the province's curriculum)

The key components of the program recommended to exploit these markets are:

- aggressive and phased use of the Internet as a regional, national and international marketing tool; initially, the operators of the project would develop a web site with information on the Claybank Brick Plant including information for potential visitors
- the initial web site package should include special information for potential / future school-group visitors, both for the purpose of providing a pre-visit orientation to students and to interest young users of the Internet in visiting the project, possibly with their families during the summer months
- within one year, the web site should include reciprocal links to comparable attractions in western Canada, such as the Medalta project in Medicine Hat and in-province attractions such as the Saskatchewan Science Centre and the Royal Saskatchewan Museum in Regina

- within three years, a Heritage West web site, linking several major heritage attractions and including the Claybank Brick Plant as a full participant, should be developed; it would be both self-standing and linked to such important sites as the Canadian Heritage Information Network maintained by Canadian Heritage and provincial and national tourism information sites

- besides linkage of the Claybank Brick Plant project with other attractions through the Internet, a formal program of display exchanges and reciprocal distribution of brochures and other information, should be established, especially in early years with Regina and Moose Jaw-based attractions such as the Temple Gardens Spa, Western Development Museum, Royal Saskatchewan Museum and Saskatchewan Science Centre

- information brochures and posters should be made available to attractions and businesses serving tourists within 90 kilometres of the Claybank Brick Plant, such as local museums, provincial and regional parks, and service stations, restaurants, motels, campgrounds and other sources of visitor accommodation

- the Claybank Brick Plant project should be actively involved in the Great Trails Getaway and Regina tourism regions and through participation in programs of Tourism Saskatchewan

- in order to attract visitors to the Claybank Brick Plant from the important visiting friends and relatives - VFR - market, an ambitious program of promotion of residents of Regina and Moose Jaw should include media articles and reports and at least two open houses during which residents of southern Saskatchewan could visit the Claybank Brick Plant free or at reduced cost (reduced admission revenue could be compensated for in part through food / beverage and concession sales)

- information packages should be made available to bus-tour companies and seniors' groups located in the three prairie provinces; special packages already developed by the Great Trails Getaway region could be incorporated in this promotion

- because trips to southern Saskatchewan are motivated up to 75% by visiting friends and relatives in the province, strong attention to this important market should be given in the early years of the project's marketing program and early in each year's operating season

- the Claybank Brick Plant would benefit strongly from the development, in conjunction with the Great Trails Getaway region, of a small number (two or three) of half-day or one-day tour loops around Claybank; such products would be of interest to fall getaway tourists, seniors and many Saskatchewan residents looking for a one or two-day trip based from home

- special attention in marketing should be given to any important operating days at area attractions, such as Dunnet Regional Park, Buffalo Pound Provincial Park and summer events in Regina and Moose Jaw; volunteers could staff a kiosk or booth to provide information and even special event promotional coupons to visitors to these attractions on days when an unusually large number of people are gathered in one location (such as, for example, Canada Day celebrations at area parks or the Moose Jaw air show)

- of paramount importance to the effective marketing of the Claybank Brick Plant, whether or not it receives World Heritage Site designation, will be to develop linkages with a better-promoted heritage tourism sector in western Canada; within the past few years, other than early initiatives in Internet-based marketing by individual attractions, the marketing profile heritage tourism in western Canada has been reduced dramatically, in part because of budget restrictions for promotion and programming, and reflected in part by a general decline in attendance at heritage tourism attractions in the region.

The recommended five-year marketing program for the Claybank Brick Plant project assumes availability of joint-marketing and piggybacking programs. Should such programs be at a lower level of financial contribution, the marketing program would have to be reduced accordingly.

In year 1 of project operation (including spending for a period of three to four months prior to opening to the public following implementation of the development program), major elements of the project's marketing budget would be:

- site visitor guide: $2,000

- involvement with Great Trails Getaway and Regina tourism regions (joint marketing programs, advertising, special programs): $6.000

- basic Internet development (web site, links, school program material): $5,000

- other links in the 90-kilometre radius around Claybank (posters, brochures, coupons, advertising): $3,000

- brochure, poster and display exchanges with other museums and attractions in the province: $5,000

- provincial / western Canadian media visits (travel writers, TV features): $2,000

- school visit package development and distribution: $3,000

- tour loop information production (maps and text): $1,000

- signage: $5,000
- piggybacking on advertising and special programs of the Saskatchewan Tourism Authority and Canadian Tourism Commission: $3,000
- development of the Heritage West marketing network (Internet, information exchanges, advertising): $4,000
- open houses for area and urban residents (two per year): $2,000
- media promotions in the area (radio and TV - season-wide contest): $4,000

In year 3 of the project's operation, the project's annual marketing budget would be modified to reflect the fact that some up-front development costs have already been borne; accordingly, the following levels of spending in the year 3 marketing budget would be anticipated:

- Internet development costs: $2,000
- brochure, poster and display exchanges with other heritage attractions would be on a wider regional basis, including the three prairie provinces: $10,000
- signage: $1,000
- piggybacking on provincial and federal advertising programs: $7,000
- area media promotions: $5,000
- provision for World Heritage Site designation-related promotion: $5,000

In year 5 of operation of the project, additional annual spending to a total of up to $10,000 could be anticipated in the following areas:

- involvement in regional associations and their programs
- Heritage West network
- special advertising opportunities
- area media promotions

It is emphasized that, by year 5 of a project's operation, it is generally critical to maintain interest in the attraction on the part of potential key markets and to attract new visitors.

6.4 FINANCING PLAN

Estimated total capital costs for the recommended Level 1.5 development program for the Claybank Brick Plant project are set out in Section 5.6.1. It is recommended that the Saskatchewan Heritage Foundation seek to obtain work-training and related program funding through provincial employment training programs under the Federal - Provincial agreement, as well as youth employment training programs which continue to fall under the jurisdiction of Human Resources Canada. Ideally, the project would have access to required program funding over no more than a three-year period. Given the levels of funding assistance provided by Canadian Heritage to comparable national historic sites' restoration and redevelopment elsewhere in Canada, it is reasonable to expect that the Federal department would provide at least $250,000 in capital funding for the project over a three to five-year period.

Including estimated capital costs related to masonry repairs and the need for a working capital fund of at least $50,000 to provide for early-year deficits and operating contingencies, the Saskatchewan Heritage Foundation would require access to approximately another $400,000 in project funding. It is recommended that the Foundation follow a strategy which combines corporate, individual and Foundation contributions:

- up to $170,000 in financial and other contributions toward the project from corporate sources, including A.P. Green, the last operator of the Claybank Brick Plant; a recognition policy through naming of specific components of the project after major donors is recommended

- the Foundation would provide matching funding toward the project to a maximum of $170,000, ideally over no more than a three-year period

- special fund raising campaigns would aim to raise at least $60,000 in the immediate area around Claybank and in the province as a whole; such special initiatives could include a buy-a-brick campaign, sales of lifetime memberships (offering reduced or free admissions to membership holders and other special recognition) and campaigns aimed at groups and individuals with a special interest in heritage resources and activities.

6.5 ACTION PLAN

A number of distinct, but sometimes interrelated tasks must be completed to take the Claybank Brick Plant project from the current business planning stage, through planning, design and development, to public opening and operation. A the most general level, these actions can be divided into those that are primarily development-related and those that are primarily management-related.

6.5.1 Development-related Actions

a. Initial Investigations

Before any detailed planning or design work can be undertaken, the following investigations (as described in Section 4.4.3) must be undertaken (it is assumed that they will be initiated in 1997 and completed by the autumn of 1998):

- Geotechnical Investigation
- Structural Investigation
- Architectural Historic Material Investigation
- Industrial Archaeological Survey

b. Master Planning

With the completion of the above investigations (assumed to be in late 1998), two major planning components should be initiated, as follows:

- **Interpretation Master Plan**: a comprehensive plan, detailing interpretive goals and objectives, target audiences, interpretive themes and stories, personal and non-personal delivery programs, recommended media, evaluation and monitoring framework, implementation strategy, and revised capital cost estimates.
- **Site Development Master Plan**: a comprehensive Master Plan, providing a preliminary context for subsequent detailed design, a recommended implementation / phasing strategy and revised capital cost estimates; this plan should be based on the recommendations in the Interpretive Master Plan regarding visitor flow and interpretive development.

Based on startup of the master planning process in late 1998, it is expected that it should be complete by the spring of 1999.

c. Pre-development Site Work

Pre-development site work has already commenced and should continue. Although some work can, and should, proceed before site planning and design is underway, some actions should be coordinated with (and thus must await completion of) the site development master plan. The following work is described, in more detail, in Section 4.4.4:

Fire Protection Measures

- perimeter fire guard establishment and maintenance
- clean up of debris and dried grass throughout the site
- fire-resistant landscaping around wood structures (details of this component should be consistent with recommendations in the site development master plan)
- installation of water line, complete with fire hydrants and pumping station

Site Security Measures

- installation of fencing along the property line adjacent to the access road
- installation of lockable gate in the fence along the clay pit road
- installation of safety fence around the lagoon
- reconstruction of dock at west end of lagoon
- installation of monitored site security system
- installation of temporary site lights to provide interim security to the plant

Provision / Renewal of Site Services

- re-commissioning of natural gas line into the plant to provide gas for heating and for at least one kiln (determination of which kiln will need to await results of initial investigations and recommendations in the master plan)
- installation of a four pair telephone line to provide security services and a line of communication for contractors working at the site

Site Drainage Measures

- cleaning of natural drainage channels of debris and excessive weed growth; checking of culverts for structural damage and replacement as required; provision of positive drainage to reduce moisture penetration to the building foundations

- regrading of area around West transfer house to minimize moisture penetration to the foundation

Kiln Area Clean-up / Repair

- weed removal from the outdoor area around kilns

- repair of brick walking surface around kilns

Environmental Measures

- take action required to address all environmental concerns noted in Section 4.4.4

Plant Equipment Inventory and Protection

- undertake inventory of, and all required protective measures for, plant equipment and tools noted in Section 4.4.3

Based on scheduling assumptions noted previously, given that much of this Pre-development site work can be initiated immediately (or is already underway), and given that some will need to await recommendations in the site development master plan, it is expected that all Pre-development site work can be completed before the end of the 1999 construction season.

d. Building Stabilization / Rehabilitation

As with the pre-development site work, significant work has already been undertaken towards the stabilization of buildings on the site. This work should continue; however, some work will need to await the completion of the initial investigations and surveys to ensure that all significant structural integrity and public safety issues are understood and addressed. Further, building rehabilitation work (as recommended in Section 5.6.1) may need to await completion of both the master planning process and the preparation of any

more detailed designs that may be required as a result of master plan recommendations. Indeed, it is anticipated that rehabilitation of some buildings may not be completed (or even initiated) until after opening of the site to the public.

Certain buildings will, however, need to be ready for public use at opening. They include:

- the bunkhouse;
- the brick press and east brick transfer areas of the main plant;
- the hand mold and hot floor areas of the main plant;
- one kiln; and
- the stock sheds.

e. Site and Infrastructure Development

Site and infrastructure development, as recommended in Section 5.6.1, should begin upon completion of the site development master plan. Many of the development items noted in Section 5.6.1 will require detailed design work before construction can occur. Thus, it is expected that design work will begin in 1999 and that all construction work will be completed by the end of the 2000 construction season.

f. Interpretive Development

As with site and infrastructure development, design and fabrication / construction / installation of all interpretive development is expected to begin in 1999 and to be complete by the end of the construction season in the year 2000.

6.5.2 Management-related Actions

Although not specifically a management-related action, the preparation and submission of operations and maintenance manuals relating to buildings, systems and the site, should occur as these features are made ready for public opening of the project (and, in the case of buildings rehabilitated after public opening, as the work is completed). Further, these individual manuals should be compiled and organized to ensure adequate and appropriate operations and maintenance of all facilities and systems on-site after project opening.

The following management-related actions (noted in relation to the project's opening date) will be required:

- six months before opening: establish the new corporation, and appoint its first Board of Directors
- six months before opening: create the Friends of the Claybank Brick Plant Society and recruit volunteers to assist with on-site and other activities
- four months before opening: hire the General Manager for the project
- three months before opening: initiate the project's year one marketing program
- three months before opening: negotiate service contracts and commercial licences (possibly including accounting, maintenance, bed and breakfasts, trail rides and gift shop / concession)
- two months before opening: hire and train seasonal staff and carry out a training program for on-site volunteers.

6.5.3 Anticipated Opening Date

Based on the process set out above, and assuming that sufficient funding is available to complete required building rehabilitation, it is reasonable to suggest that the Claybank Brick Plant will be ready for full public opening and operation in the spring of 2001.

APPENDIX 1

PRELIMINARY CAPITAL COST ESTIMATE

ITEM	LEVEL 1	LEVEL 2	LEVEL 3
INV., ASSESSMENT AND PLANNING			
- Geotechnical Investigation	25,000.00	25,000.00	25,000.00
- Structural Investigation	27,000.00	27,000.00	27,000.00
- Arch. Historical Material Investigation	10,500.00	10,500.00	10,500.00
- Archaeological Survey	24,000.00	24,000.00	24,000.00
- Site Development Master Plan	15,000.00	25,000.00	25,000.00
- Interpretation Master Plan	7,500.00	12,000.00	18,000.00
SUBTOTAL	109,000.00	123,500.00	129,500.00
- 25% contingency on Master Plan estimates	5,600.00	9,300.00	11,000.00
SUBTOTAL	114,600.00	132,800.00	140,500.00
PREDEVELOPMENT SITE WORK			
- Fire Protection Measures	132,000.00	132,000.00	132,000.00
- Site Security Measures	31,000.00	31,000.00	31,000.00
- Site Services	5,000.00	5,000.00	5,000.00
Add: Site Drainage	10,000.00	25,000.00	25,000.00
: Kiln area weed removal	1,600.00	1,600.00	1,600.00
: Kiln working surface repair	16,000.00	16,000.00	16,000.00
- Environmental Measures	42,500.00	42,500.00	42,500.00
- Equipment inventory and protection	24,000.00	24,000.00	24,000.00
SUBTOTAL	262,100.00	277,100.00	277,100.00
- 25% estimate contingency	65,500.00	69,300.00	69,300.00
- 10% design and management	32,800.00	52,000.00	52,000.00
SUBTOTAL	360,400.00	398,400.00	398,400.00
BUILDING STABILIZATION/ REHAB.			
- Bunk House	30,000.00	135,000.00	300,000.00
- Clay Storage Shed / Crusher	31,000.00	46,000.00	46,000.00
- Brick Press Area	88,000.00	98,000.00	98,000.00
- Brick Transfer Area	20,000.00	25,000.00	25,000.00
- Machine Shop	14,000.00	26,000.00	26,000.00
- Hand Mould, Hot Floor, Drying Tunnels, West Transfer Shed	68,000.00	122,000.00	122,000.00
- Carpenter's Shop	4,000.00	44,000.00	44,000.00
- Kilns	40,000.00	100,000.00	100,000.00
- Stock Sheds	45,000.00	95,000.00	95,000.00
- Office	4,000.00	4,000.00	46,000.00
- Boiler Room	10,000.00	10,000.00	18,000.00
- West Residence	5,000.00	5,000.00	53,000.00
- Garage	0.00	0.00	0.00
-Laboratory	4,000.00	4,000.00	44,000.00
SUBTOTAL	363,000.00	714,000.00	1,017,000.00
- 25% estimate contingency	91,000.00	179,000.00	244,000.00
- 15% design and management	68,000.00	134,000.00	189,000.00
SUBTOTAL	522,000.00	1,027,000.00	1,450,000.00

PRELIMINARY CAPITAL COST ESTIMATE

SITE AND INFRASTRUCTURE DEVELOPMENT			
- Vault Toilets	13,000.00	13,000.00	13,000.00
- Water Cistern	4,000.00	4,000.00	0.00
- Potable Water System	0.00	0.00	30,000.00
- Sewage Lagoon	0.00	0.00	50,000.00
- Visitor Parking Lot	300.00	6,000.00	6,000.00
- Entry Enhancement	0.00	1,500.00	3,000.00
- Entry Road	350.00	350.00	625,000.00
- Gravel Pathways	1,000.00	1,000.00	1,000.00
- Trail to Clay Pits	0.00	18,000.00	22,200.00
- Rest Areas / Stops	0.00	2,400.00	2,800.00
- Highway Signage	6,000.00	8,600.00	16,000.00
SUBTOTAL	24,650.00	54,850.00	769,000.00
- 25% estimate contingency	6,200.00	13,700.00	192,000.00
- 15% design and management	4,600.00	10,300.00	144,000.00
SUBTOTAL	35,450.00	78,850.00	1,105,000.00
INTERPRETIVE DEVELOPMENT			
- Enhanced Accessibility	2,000.00	3,000.00	3,000.00
- Barriers for Public Safety	1,500.00	2,000.00	2,000.00
- Demonstration Equipment, Safety Features	3,000.00	15,000.00	19,000.00
- Interpretive Panels/Storyboards	20,000.00	30,000.00	40,000.00
- Site/Directional Signage	2,500.00	3,750.00	4,000.00
- Interactive Displays	0.00	10,000.00	25,000.00
SUBTOTAL	29,000.00	63,750.00	93,000.00
- 25% estimate contingency	7,250.00	16,000.00	23,000.00
- 15% design and management	5,500.00	12,000.00	17,500.00
	41,750.00	91,750.00	133,500.00
SUMMARY			
- Inventory, Assessment and Planning	114,600.00	132,800.00	140,500.00
- Predevelopment Site Work	360,400.00	398,400.00	398,400.00
- Building Stabilization / Rehabilitation	522,000.00	1,027,000.00	1,450,000.00
- Site and Infrastructure Development	35,450.00	78,850.00	1,105,000.00
- Interpretive Development	41,750.00	91,750.00	133,500.00
TOTAL	1,074,200.00	1,728,800.00	3,227,400.00